

Hamer Enterprises®

APPLICATION SOFTWARE PROCUREMENT AND IMPLEMENTATION SERVICES AGREEMENT – AMENDMENT 1

This Supplemental Agreement, Amendment Number 1, to the Contract for eTAX, Property Tax Administration System ("Amendment"), is made and entered into by and between Porter County (CLIENT) and Hamer Enterprises (HE), a Texas corporation, whose principal office is located at 4200-A N Bicentennial Drive, McAllen, TX 78504. The content of this Supplemental Agreement is in addition the original contract. All terms and conditions contained within the original contract are applicable to this supplemental agreement; but fore the language contained in section 6 of the original contract for the Application Software Support Agreement (Exhibit F) and item 5 of the original Application Software User License Agreement (Exhibit E).

WHEREAS, the CLIENT and HE entered into that certain Contract for Property Tax Administration System, dated, May 10, 2007, wherein HE agreed to sell CLIENT, and CLIENT agreed to acquire and license from Contractor, the eTAX System and eSale Module; and

WHEREAS, the parties desire to amend the Contract as provided below.

1. AMENDMENTS:

The Contract Amendments consists of:

This document and

EXHIBITS A through D, attached hereto.

This Contract is hereby amended so that its terms, conditions and provisions, as heretofore amended, where feasible and when not in conflict with this Amendment, shall encompass and apply to the additions described herein. For purposes of this Amendment, the word "herein" refers to this Amendment and the Exhibits attached hereto.

2. DESCRIPTION:

Scope

The contract is hereby amended so that its terms, conditions and provisions, where feasible and not in conflict with the Amendment, shall encompass and apply to the CLIENT's purchase of eCAM - Property Assessment System (SYSTEM) as further described in Exhibit C.

3. PAYMENT:

In consideration of supplying the SYSTEM, the CLIENT shall pay HE an aggregate cash consideration of \$ 214,420 United States Dollars in accordance with the progress payments schedule set forth below. This aggregate cash consideration is exclusive of all present and future federal, state or local sales, use, excise or processing taxes or any other tax or charge, that is or may be imposed upon the product and services provided herein save taxes on net income. HE's failure to include or correctly compute such taxes on its invoices shall not relieve the CLIENT of its obligation hereunder. HE will submit invoices to the CLIENT in accordance with said schedule and the CLIENT shall pay such invoices upon receipt thereof.

A Project Schedule as set forth in Exhibit D of the estimated delivery timeframes of each milestone of the SYSTEM which governs the payment schedule consistent with the following:

MILESTONE	PAY	MENT
I. Execution of Agreement:		
50% of License Fees	\$	42,500
II. Delivery of Application Software:		
30% of License Fees	\$	25,500
10% upon acceptance by Assessor	\$	8500
10% upon State Certification, but not later than 12/30/2008 as long as HE commits in writing to complete State Certification. Payment and sign-off should no be reasonable withheld.		8500
III. Delivery of APEX Sketching Software	\$	15,000
IV. Upon Conversion of Existing Sketches	\$	18,000
V. Delivery of Client Services		
Implementation Model	\$	83,920
Travel and per diem expenses will be invoiced as accrued.	\$	12,500
Total Agreement Amount	\$	214,420

The parties shall mutually agree upon reasonable timeframes for the project milestones. Failure to meet the mutually agreed upon timeframes, shall be a valid ground for termination of this agreement.

4. APPLICATION SOFTWARE LICENSES:

HE grants to the CLIENT and the CLIENT hereby accepts a nontransferable, non-exclusive license to use the application software system itemized in principle in EXHIBIT A. Concurrent with this Amendment the parties will execute the HE Application Software License Agreement attached hereto as EXHIBIT A.

5. APPLICATION SOFTWARE SUPPORT SERVICES:

Contracted HE application software products are to be eligible for on-going contractual support services, see EXHIBIT B. The execution of the Application Software Support

Services Agreement establishes the level of HE's continuing commitment to the support of its software.

It is understood by both parties that IF Porter County is the first County in Indiana to sign a contract for the HE software described in this agreement; Porter County will have the first opportunity to request reasonable changes to the software's screens and functions for use in Indiana. It is further understood that these changes may or may not result in additional costs as outlined in paragraph 10(d) of the Application Software Support Agreement. No changes that will result in charges to the client will be performed without a mutually agreed upon written document.

It is understood by both parties that IF Porter County is NOT the first County in Indiana to sign a contract for the HE software described in this agreement; Porter County will have the option to: 1) work with the first county to sign a contract for the HE software described in this agreement (if that county is agreeable) to make reasonable requests for changes to the software's screens and functions for use in Indiana at no additional cost or 2) make reasonable requests for changes acknowledging that there may or may not be additional cost as outlined in paragraph 10(d) of the Application Software Support Agreement. No changes that will result in charges to the client will be performed without a mutually agreed upon written document.

6. GENERAL:

This Agreement, EXHIBITS A through D constitute the entire Amendment, understanding and representation between HE and CLIENT. No modifications or amendments to the Agreement shall be valid unless in writing and signed by duly authorized representatives of the parties.

A waiver of a breach or default under this contract shall not be a waiver of any other or subsequent default.

THIS AGREEMENT SHALL NOT BE EFFECTIVE UNTIL EXECUTED BY CLIENT AND ACCEPTED BY AN AUTHORIZED REPRESENTATIVE OF HE AT ITS PRINCIPAL PLACE OF BUSINESS.

CLIENT and HE have caused this Agreement to be executed by their duly authorized officers as of the date below.

HE:	CLIENT:
HAMER ENTERPRISES	PORTER COUNTY
Willing Home	
Authorized Signature	Authorized Signature
William C Hamer	Robert P. Harper
Typed	Typed
CEO	President, Board of Commissioners
Title	Title
<i>10-3-2007</i> Date	10/2/07 Data
Date	Date G. Como
	Authorized Signature
	John A. Evans
	Typed
	Vice-President
	Title
	Authorized Claneture
	Authorized Signature
	Typed
	Title

EXHIBIT A: APPLICATION SOFTWARE LICENSE AGREEMENT

Hamer Enterprises®

APPLICATION SOFTWARE USER LICENSE AGREEMENT

HAMER ENTERPRISES of 4200-A N Bicentennial Dr, McAllen, Texas 78504 (hereinafter referred to as LICENSOR) agrees to grant and **PORTER COUNTY** at 155 Indiana Avenue, Suite 107, Valparaiso, Indiana 46383 (hereinafter referred to as LICENSEE) agrees to accept for valuable consideration the sufficiency of which is hereby acknowledged, a non-transferable, non-exclusive license (hereinafter referred to as LICENSE) to use the application computer programs and accompanying documentation (hereinafter referred to as SOFTWARE) identified as follows:

Item	Product Acronym	Product/Module Description & Version	User Capacity
1.	eCAM	Property Assessment Administration System V4 R1	0 - 80

Note: The items above have been delineated by LICENSOR and the LICENSEE to operate only in the following computer user capacity environment:

Make	Model	Processor	Serial Number
IBM	AS400		1031275

Unless otherwise stated within this Agreement, a total higher computer user capacity may require the payment of a fee for the increased user capacity which fee must be reasonable and mutually agreed upon. If the county requires more than 80 users, then the county agrees to pay 1/80 of the original license list price of \$85,000 for each additional user. It is also understood that 18% of the additional user cost will be added to the yearly software support agreement.

If HE changes the hardware platform that the purchased license software currently runs on as described above; Porter County reserves the right to continue to use the license software

purchased on the existing platform for a period not to exceed 5 years. Porter County further reserves the right to continue paying the stated fees outlined in the Application Software User-Based Support Services Agreement and HE agrees to continue to provide the services described in that agreement for a period not to exceed 5 years.

1. TITLE:

The original and any copies of the SOFTWARE, in whole or in part, including any subsequent improvements or updates, shall be the property of LICENSOR subject to all conditions in Article 2 of this Agreement.

2. USE AND DISCLOSURE OF SOFTWARE:

LICENSEE acknowledges that the SOFTWARE constitutes trade secrets and proprietary information of LICENSOR. Subject to Paragraph 3, LICENSEE shall not without LICENSOR's prior written consent, (a) reproduce, sell, lease, assign, transfer, license, sublicense, share, give, otherwise dispose of the SOFTWARE or any parts thereof; (b) permit the SOFTWARE or any parts thereof to be copied or reproduced by any persons or entities; (c) permit the SOFTWARE or any parts thereof to be used by any persons or entities other than the LICENSEE's employees in the course of their employment by the LICENSEE; or (d) disclose the SOFTWARE or any parts thereof to any persons or entities except to employees of LICENSEE solely for the purpose of using the SOFTWARE in the course of their employment by LICENSEE. LICENSEE further agrees that it will (a) cause the SOFTWARE to be used and operated in accordance with its intended use; and (b) notify LICENSOR, if requested by LICENSOR, of the location of the SOFTWARE and all copies thereof.

3. COPIES OF SOFTWARE:

Notwithstanding anything to the contrary contained in Paragraph 2 or elsewhere in this agreement, LICENSEE, without LICENSOR's consent may (a) make temporary copies of SOFTWARE herein for backup computer equipment if the LICENSEE's computer equipment is temporarily inoperative for any reason, and/or; (b) copy any portion of SOFTWARE herein licensed from storage units or media into computer equipment in the normal course of the operation of computer equipment or in support of the use of any computer equipment or program; or from storage unit or media to storage unit or media in the normal course of software backup procedures.

SOURCE CODE:

LICENSOR agrees to provide copies of all its source programs to the LICENSEE notwithstanding Article 2 of this agreement, and subject to all conditions and constraints thereof and to insure that all such programs are the most current releases of each module. Source codes for those modules licensed will be made available in any event to the LICENSEE if:

- (a) LICENSOR defaults on the agreement with LICENSEE;
- (b) LICENSOR ceases to do business; or
- (c) LICENSOR stops maintenance support of the software module in question without cause from LICENSEE.
- (d) If LICENSEE requires specific software changes and LICENSOR agrees to provide them either under the maintenance agreement as no charge

enhancements or LICENSOR and LICENSEE agree to a quoted fee for the specified work and the LICENSOR is unable to complete within a mutually agreed time frame, specific software objects or modules will be provided to LICENSEE by LICENSOR and LICENSEE will notify LICENSOR of any and all changes made.

In the event condition (a), (b), (c) or (d) materializes, LICENSEE has unrestricted access to all modules it has accepted from LICENSOR, but may not transfer machine or human readable programs, source codes or documentation to any other agency or commercial business, under any conditions. Nothing herein gives the LICENSEE the authority to alter the source code without express written approval of LICENSOR unless condition (a), (b), (c) or (d) above exist.

4. USE OF SOFTWARE BY LICENSOR:

Nothing in this Agreement shall prevent LICENSOR from using SOFTWARE identical or similar to the SOFTWARE or from reproducing, selling, leasing, licensing, assigning or otherwise disposing of identical or similar SOFTWARE to others.

5. LIMITED WARRANTY AND LIMITATION OF LIABILITY:

LICENSOR warrants that the SOFTWARE will conform to LICENSOR's published program specifications for the SOFTWARE as delivered to LICENSEE with the SOFTWARE.

LICENSEE ACKNOWLEDGES THAT THE SOFTWARE IS OF SUCH COMPLEXITY THAT IT INHERENTLY MAY HAVE DEFECTS AND AGREES THAT LICENSOR'S SOLE AND EXCLUSIVE LIABILITY FOR BREACH OF THE WARRANTY STATED HEREIN, AND AS LICENSEE'S SOLE AND EXCLUSIVE REMEDY, LICENSOR WILL, WITHIN A REASONABLE TIME PERIOD AFTER RECEIPT OF WRITTEN NOTICE FROM LICENSEE, PROVIDE PROGRAMMING SERVICES TO CONFORM THE SOFTWARE TO SAID SPECIFICATIONS, PROVIDED THAT LICENSOR'S DIAGNOSIS INDICATES THAT ANY SUCH NON-CONFORMITY WAS IN EXISTENCE AT THE TIME OF DELIVERY OF THE SOFTWARE TO LICENSEE AND PRIOR TO ANY ALTERATIONS THERETO.

EXCEPT FOR THE EXPRESS WARRANTY CONTAINED HEREIN, LICENSOR MAKES NO WARRANTY OF ANY KIND WHATSOEVER, EITHER EXPRESS OR IMPLIED, INCLUDING WITHOUT LIMITATION, AND EXPRESS OR IMPLIED WARRANTIES OF MERCHANTABILITY AND/OR FITNESS FOR A PARTICULAR PURPOSE. EXPRESS WARRANTY AND EXCLUSIVE REMEDY STATED HEREIN IS IN LIEU OF ALL LIABILITIES OR OBLIGATIONS OF LICENSOR FOR DAMAGES ARISING OUT OF OR IN CONNECTION WITH THE DELIVERY, USE, OR PERFORMANCE OF THE SOFTWARE OR BREACH BY LICENSOR OF ANY TERM OF THIS AGREEMENT. IN NO EVENT SHALL LICENSOR HAVE ANY OBLIGATION OR LIABILITY FOR DAMAGES, WHETHER INCIDENTAL. CONSEQUENTIAL, OR OF ANY **OTHER** WHATSOEVER, EVEN IF LICENSOR HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

LICENSOR warrants that, when used in accordance with the instructions provided by LICENSOR, the licensed software will operate within the guidelines established by the State of Indiana, Department of Local Government Finance-specifically 50 IAC 23 and any updates or revisions thereto which are mutually agreed upon between LICENSOR and LICENSEE thereto, that have been formally adopted by the State of Indiana, Department of Local Government Finance and in accordance with a current Application Software User-

Based Support Services Agreement between LICENSOR and LICENSEE.

The above warrant is a limited warranty and is the only warranty made by LICENSOR with respect to the Software. LICENSOR makes no other warranties, expressed or implied, relating to the Software and LICENSOR specifically disclaims all expressed or implied warranties, including but not limited to, the implied warranties of merchantability, fitness for a particular purpose, non-infringement, latent defects, with respect to the Software, and any warranties arising out of course of dealing or usage or trade.

The parties agree and understand that if LICENSOR is not certified by the State of Indiana and Porter County is not satisfied with the SYSTEM, then Porter County is entitled to a refund of any and all license fees paid by LICENSEE according to the fees set forth in Paragraph 3. Payment sub-article I and II, in an amount not to exceed \$85,000.00. Once LICENSOR achieves state certification, LICENSEE's only remedy is as otherwise set forth in this agreement.

The parties agree that the LICENSOR will not prohibit access and use to the software if LICENSEE decides to terminate or fails to renew the Application Software User-Based Support Services Agreement.

In no event shall LICENSOR prohibit access and use of the software so long as the LICENSEE has not breached any material terms of the contract.

6. TERMINATION:

This Agreement may be terminated by LICENSOR if LICENSEE fails to comply with any of the terms and conditions of the Agreement. The license granted herein for SOFTWARE shall remain in force until LICENSEE discontinues the use of SOFTWARE for use and notifies LICENSOR in writing of such discontinuance.

7. GENERAL:

This Agreement may be amended only by means of a written agreement executed by LICENSOR and LICENSEE. This Agreement shall be governed by and construed in accordance with the laws of the State of Indiana.

8. APPENDIX A.

The parties agree that correspondence received from Hamer on June 12, 2007 and the representations contained therein are hereby incorporated by reference Appendix A and become a part of this contract.

ACCEPTED BY AN AUTHORIZED REPRESENTAT PLACE OF BUSINESS.	
By signature below, this Agreement is accepted by LICENSOR and effective as of 2007.	Via execution below, signer certifies that he is duly authorized to execute this Agreement for the LICENSEE.
LICENSOR:	LICENSEE:
HAMER ENTERPRISES () () () () () () () () () () () () () (PORTER COUNTY
Authorized Signature William C Hamer	Authorized Signature Robert P. Harper
CEO	President, Board of Commissioners
Title /0-3-2007	Title 10/2/07
Date	Date Com Com
	Authorized Signature John A. Evans
	_ JUHH A. EVANS

Vice-President

Authorized Signature

Title

Title

EXHIBIT B: APPLICATION SOFTWARE SUPPORT AGREEMENT

Hamer Enterprises®

APPLICATION SOFTWARE USER-BASED SUPPORT SERVICES AGREEMENT

HAMER ENTERPRISES whose principal office is located at 4200-A N Bicentennial Dr, McAllen, Texas 78504, (hereinafter referred to as HE) and **PORTER COUNTY**, at 155 Indiana Avenue, Suite 107, Valparaiso, Indiana 46383, (hereinafter referred to as CLIENT), a licensee of HE software, agree as follows:

- 1. HE shall provide the application software support services (hereinafter referred to as SERVICE) described in paragraph 4 for a period of twelve (12) months beginning 05/01/2008. Unless otherwise specified and agreed to in writing between HE and CLIENT, support SERVICE shall be guaranteed for a twelve (12) month period; renewable thereafter for an additional twelve (12) month period upon acceptance of an Annual Renewal Agreement. This SERVICE Agreement may be canceled after this initial twelve (12) month Agreement or any renewal period upon a ninety (90) day written notice. Unless otherwise specified within this Agreement, charges may be adjusted after the initial term for any new or renewal agreements.
- 2. CLIENT may purchase, and HE shall not unreasonably withhold, continued SERVICE from CLIENT for an additional twelve (12) month period at the rates specified in Schedule B, attached hereto, or at the then prevailing annual billing rate for SERVICE, unless:
 - (a) CLIENT gives notice to HE within 30 days after receipt of HE's invoice for SERVICE that the CLIENT intends to terminate this Agreement,
 - (b) CLIENT is no longer a valid licensee of HE software,
 - (c) CLIENT is greater than 30 days in arrears for any HE invoice(s),
 - (d) CLIENT has failed to incorporate HE releases into the licensed software within 180 days following request for installation by HE,
 - (e) CLIENT has failed to incorporate the computer manufacturer's Operating System releases into the CLIENT's SYSTEM within 180 days following request for installation by HE,
 - (f) HE licensed software has been modified by other than HE without HE's written approval,
 - (g) the computer manufacturer's Operating System has been modified by other than the manufacturer without HE's written approval, or
 - (h) there has been an interruption in, or termination of this Agreement.
- 3. This Agreement applies to the HE software described in SCHEDULE A and is limited to the Client's IBM, AS400, Serial Number 1031275 physically located at 155 Indiana Avenue, Suite 107, Valparaiso, Indiana 46383, exclusive of revision level described in SCHEDULE A.

- 4. The SERVICE referred to in Paragraph 1 shall consist of:
 - (a) HE shall provide CLIENT with a reasonable amount of consultation by telephone via a 1:800 Customer Support Number to assist CLIENT in the use of the software during any normal forty (40) hour work week.
 - (b) The HE Support Desk shall log and track, through resolution, every CLIENT Software Action Request (SAR).
 - (c) HE will assist the CLIENT in establishing their own support desk and HE reporting procedure.
 - (d) HE shall respond to every support request with a resolution or a status of resolution (i) during the initial request call by the designated and pre-assigned account support representative or (ii) within twenty four (24) hours of the initial request to HE's support desk personnel.
 - (e) HE shall provide the CLIENT with support of software to substantially conform the software to HE's published material for that release level of software identified in SCHEDULE A. HE shall, within a reasonable time period, supply computer program code to correct any reproducible error, provided that HE's diagnostics indicate that such nonconformity or error was in existence during the term of this Agreement or during the initial Warranty Period extended to the CLIENT in the purchase agreement for HE's software.
 - (f) Suspected error conditions will be investigated and corrected by HE personnel at CLIENT's offices to the extent possible. On-site corrections shall be at the exclusive judgment of HE at no additional cost to the CLIENT. If HE, in its reasonable judgment, determines that the suspected error condition was attributable to a cause other than an error in HE's software or an enhancement by HE, the CLIENT will pay HE on a time and materials basis. In the event a dispute between HE and CLIENT develops over the cause of an error, HE and CLIENT shall work diligently, reasonably and in good faith to resolve any such dispute in a manner as expeditiously as possible. If the CLIENT and HE cannot resolve any disputes as to the cause of any errors, they shall be arbitrated in the manner outlined in the purchase agreement between HE and CLIENT.
 - (g) HE may provide the CLIENT with unsolicited error corrections or changes to the software, without additional charge, which HE determines are necessary for proper operation of its software and CLIENT shall incorporate these corrections or changes into the software within 180 days of release by HE.
 - (h) HE will provide CLIENT all enhancements released by HE as standard enhancements and which are generally made available to other customers purchasing comparable software during the term of this Agreement.
 - HE shall not install any software enhancements into the CLIENT's licensed SYSTEM without the prior written approval of the CLIENT.
 - HE shall not install any software enhancements into the CLIENT's licensed SYSTEM that have not been tested and proven in HE's master copy of the CLIENT's licensed software.
 - HE shall provide the CLIENT a description of the impact the enhancement will have on the CLIENT's installed version of the software before the installation of an enhancement.
 - (i) HE shall provide CLIENT with all government mandates free of charge with an executed support agreement in place prior to mandate.
- 5. Software SERVICE requires the installation by the CLIENT of a 33,600 Baud Modem, or HE approved equivalent at CLIENT expense. This device will permit HE to effect expeditious

software diagnostics, changes, corrections and monitoring from the HE Support Center, when appropriate. If the CLIENT feels for security purposes it cannot provide access to the SYSTEM for HE support purposes, then and only then, HE shall provide all changes, updates and corrections via a magnetic media compatible to CLIENT and HE.

6. During the term of this Agreement HE will use its best efforts to maintain the software free of defects and imperfections that would prevent the software from performing according to the original or then prevailing specifications set forth in HE's published material.

HE MAKES NO WARRANTY OF ANY KIND WHATSOEVER, EITHER EXPRESS OR IMPLIED, INCLUDING WITHOUT LIMITATION, ANY EXPRESS OR IMPLIED WARRANTIES OF MERCHANTABILITY AND/OR FITNESS FOR A PARTICULAR PURPOSE. THE REMEDY WORK STATED HEREIN IS IN LIEU OF ALL LIABILITIES OR OBLIGATIONS OF HE FOR DAMAGES ARISING OUT OF OR IN CONNECTION WITH THE DELIVERY, USE, OR PERFORMANCE OF THE SOFTWARE OR BREACH BY HE OF ANY TERM OF THIS AGREEMENT. IN NO EVENT SHALL HE HAVE ANY OBLIGATION OR LIABILITY FOR DAMAGES, WHETHER DIRECT, INCIDENTAL, CONSEQUENTIAL OR OF ANY OTHER NATURE WHATSOEVER, EVEN IF HE HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

HE warrants that, when used in accordance with the instructions provided by LICENSOR, the licensed software will operate within the guidelines established by the State of Indiana, Department of Local Government Finance-specifically 50 IAC 23 and any updates or revisions thereto which are mutually agreed upon between LICENSOR and LICENSEE thereto, that have been formally adopted by the State of Indiana, Department of Local Government Finance and in accordance with a current Application Software User-Based Support Services Agreement between LICENSOR and LICENSEE.

The above warrant is a limited warranty and is the only warranty made by LICENSOR with respect to the Software. LICENSOR makes no other warranties, expressed or implied, relating to the Software and LICENSOR specifically disclaims all expressed or implied warranties, including but not limited to, the implied warranties of merchantability, fitness for a particular purpose, non-infringement, latent defects, with respect to the Software, and any warranties arising out of course of dealing or usage or trade.

The parties agree and understand that if LICENSOR is not certified by the State of Indiana and Porter County is not satisfied with the SYSTEM, then Porter County is entitled to a refund of any and all license fees paid by LICENSEE according to the fees set forth in Paragraph 3. Payment sub-article I and II, in an amount not to exceed \$85,000.00. Once LICENSOR achieves state certification, LICENSEE's only remedy is as otherwise set forth in this agreement.

The parties agree that the LICENSOR will not prohibit access and use to the software if LICENSEE decides to terminate or fails to renew the Application Software User-Based Support Services Agreement.

In no event shall LICENSOR prohibit access and use of the software as long as the LICENSEE has not breached any material terms of the contract.

7. Error Corrections:

In the event of a breach of any System or Software warranties provided to the CLIENT or continued as a result of this Agreement, the CLIENT will provide notice of such breach to HE (hereinafter referred to as a SAR), classifying the nature of the breach as a Severity 1, 2, 3 or

4 SAR, as CLIENT may determine in its reasonable discretion, in accordance with the following severity code guidelines:

<u>Severity 1</u>: An error causing (i) "crashes" of the System, (ii) irrecoverable loss or corruption of data, or (iii) loss of primary System or Software functionality for which there is no documented means of circumvention. "Circumvent" shall mean, as applied to an error, a change in operating procedures whereby CLIENT can conveniently avoid any deleterious effects of such error. (A Severity 1 SAR is sometimes referred to as *Urgent*.)

<u>Severity 2</u>: An error causing (i) recoverable loss or corruption of data, (ii) loss of primary System or Software functionality that can be circumvented in a manner that is documented or easily identified or (iii) loss of secondary System or Software functionality that cannot be circumvented. (A Severity 2 SAR is sometimes referred to as *Critical*.)

<u>Severity 3</u>: An error causing (i) loss of secondary System or Software functionality that can be circumvented in a manner that is documented or easily identified or (ii) difficulties in the user interface. (A Severity 3 SAR is sometimes referred to as *Minor*.)

<u>Severity 4</u>: An error causing no loss of data or functionality that can conveniently be circumvented by appropriate CLIENT procedures. (A Severity 4 SAR is sometimes referred to as *Minor*.)

HE acknowledges that breaches in warranty(s) which cause errors in the System or Software, other than Severity 3 and Severity 4 SARs, are extremely serious and must be resolved with the greatest possible urgency. Therefore, HE agrees to correct reported SARs, as follows:

Response. HE shall accept requests from the CLIENT to their Support Desk via e-mail or telephone followed by e-mail for support from the CLIENT's appointed Help Desk liaison personnel. If the CLIENT reports a Severity 1 or 2 SAR condition, and this request is made before 5:00 PM CST, then HE shall provide an initial response within two (2) hours. If the condition is reported after 5:00 PM CST, then HE shall provide a response by 9:00 AM CST on the next business day. With regard to Severity 3 or 4 SAR conditions, HE shall provide an initial response by the next business day. For purposes of all responses HE and CLIENT shall promptly agree in good faith to provide what additional information or error documentation will be required to permit HE to resolve any SARs.

Resolution. HE shall resolve Severity 1 SARs within one (1) calendar day. HE shall resolve Severity 2 SARs within two (2) business days. HE shall use its best efforts to resolve Severity 3 SARs within five (5) business days. HE shall use its best efforts to resolve Severity 1 and Severity 2 SARs by delivering emergency releases to CLIENT, shall generally resolve Severity 3 SARs by documenting a means of circumvention, and shall resolve Severity 4 SARs within thirty (30) business days.

- 8. Beyond the initial purchase agreement period, HE will invoice CLIENT for the support fee described in SCHEDULE B. Invoices for SERVICE will be furnished annually in advance. All invoices are due and payable in full upon receipt.
- 9. Support fees shown in SCHEDULE B are exclusive of all present and future federal, state or local sales, use, excise or processing taxes or any other tax or charge that is or may be imposed on the SERVICE provided, save taxes on net income. HE failure to include or correctly compute such taxes on its invoices shall not relieve CLIENT of its obligation hereunder.

- **10.** HE will provide additional SERVICE to maintain, modify, improve or expand the SYSTEM in any of the following ways:
 - (a) A fixed price support agreement effective upon installation and acceptance of baseline product is established as a percentage of List Price for the application software. HE provides for a fixed annual support cost of 18% of List Price. This service provides for all standard up-dates, governmental mandates, improvements and on-site services required by HE at no additional charge as well as daily remote support services for defects that develop from original and/or subsequent tailored or customized specifications.
 - (b) The support agreement fee noted in 10(a) will not increase for a minimum period of three (3) years, and thereafter any increase will not exceed 5% per year.
 - (c) Fixed-price, turn-key hardware and/or software SYSTEM enhancement.
 - (d) Time and materials, "not to exceed" basis at the HE prevailing hourly rates. Current rates are \$150-\$225 per hour (depending upon the skill level required of the task requested) plus per diem expenses.
 - (e) The client is entitled to request reasonable changes to the software after final acceptance. It is understood that such changes may or may not result in additional cost as outlined in paragraph 10(d).

Costs for enhancements, or modifications are provided upon written request by the CLIENT in compliance with HE's established Software Action Request (SAR) Procedures. Responses will be in writing, valid for a fixed period of time and can be extended beyond the validity date by mutual consent. All modifications or improvements are acceptance tested in the CLIENT's test or operational environment. Without an executed Support Services Agreement, a ninety (90) day software warranty is provided upon acceptance of the enhancement or modification by the CLIENT. All application software provided by HE is proprietary, with source code provisions detailed in HE's Application Software License Agreement.

- **11.** The CLIENT agrees that all enhancements shall be the exclusive property of HE pursuant to the CLIENT-HE License Agreement.
- **12.** During the course of this Agreement, CLIENT shall provide HE personnel with adequate work space for technicians as may be required by HE to carry out its SERVICE obligations.
- 13. CLIENT will be responsible for maintaining the computer hardware, communications equipment, telephone lines, cabling, modems and all other hardware equipment. CLIENT will make available reasonable computer time for the testing and support of software. CLIENT will make available all necessary supplies such as paper, magnetic tapes and disk packs.
- 14. HE and CLIENT agree that (a) each laborer shall have wages computed on the basis of a standard work day of eight (8) hours and a standard work week of forty (40) hours in the work week; and (b) no laborer shall be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous to his health and safety as determined under safety and health standards promulgated by the Secretary of Labor by regulations (20 CFR 1518).
- 15. HE certifies that it is aware of the provisions of the Labor Code of the State of Indiana which

requires every employer to be insured against liability for workmen's compensation or to undertake self-insurance in accordance with the provisions of said laws, and it certifies that it will comply with such provisions and will provide upon request proof of such compliance to the CLIENT.

- 16. HE and CLIENT agree that support SERVICE is provided during HE's normal forty (40) hour work week. Certain critical conditions may exist which require work outside these hours, and HE will make a best effort to respond. However, HE reserves the right to provide a price quotation and estimate of time for SERVICE requested by the CLIENT which requires substantial work outside HE's normal working hours.
- 17. HE and CLIENT agree that because HE has invested significant time and cost in the training and development of the skills and knowledge of their employees toward a beneficial understanding and knowledge of the specific software licensed to the CLIENT and the CLIENT's business processes, business procedures and general application environment; the CLIENT will pay HE an amount equal to twice an employee's then current annual wage or salary if the CLIENT employs an HE, HE parent company, HE subsidiary or HE successor company employee during the term of this agreement or within six (6) months after termination of this agreement. This payment shall be due within thirty (30) days of the employee's employment date with the CLIENT.
- **18.** If any provisions of this Agreement shall be held to be invalid, illegal or not enforceable; the validity, legality and enforceability of the remaining provisions shall not in any way be affected or impaired thereby.
- 19. This Agreement shall be governed according to the laws of the State of Indiana.
- **20.** The parties hereto may not assign the right or obligations hereunder without the prior written consent of the other party.
- 21. This Agreement, including SCHEDULE A and B attached hereto, constitute the entire Agreement, understanding and representations between HE and the CLIENT. No modifications or amendments to the Agreement shall be valid unless in writing and signed by the duly authorized representative of each party.
- 22. HE shall indemnify and save harmless CLIENT and its agents and employees from all suits, actions or claims of any character, type or description brought or made for or on account of any injuries or damages received or sustained by any person or persons or property, arising out of, or occasioned by the acts of HE or its agents or employees in execution or performance of this Agreement.

THIS AGREEMENT SHALL NOT BE EFFECTIVE UNTIL EXECUTED BY CLIENT AND ACCEPTED BY AN AUTHORIZED REPRESENTATIVE OF HE AT ITS PRINCIPAL PLACE OF BUSINESS.

By signature below, this Agreement is accepted by HE and effective as of, 2007.	Via execution below, signer certifies that he is duly authorized to execute this Agreement for the CLIENT.
HE:	CLIENT:
HAMER ENTERPRISES	PORTER COUNTY
Authorized Signature	Authorized Signature
William C Hamer	Robert P. Harper
CEO	President, Board of Commissioners
Title /0-3-07	Title 10/2/07
Date	Date Com Com
	Authorized Signature
	John A. Evans
	Vice-President
	Title
	Authorized Signature
	Title

SCHEDULE A APPLICATION SOFTWARE PRODUCTS TO BE SUPPORTED

HE shall provide the above described software support SERVICE to the HE software SYSTEMS and/or software modules listed below:

Item	Product Acronym	Product/Module Description & Version
1.	eCAM	Property Assessment Administration System V4 R1

Note: The items above have been delineated by HE and the CLIENT to operate only in the following computer capacity environment:

Make	Model	Processor	Serial Number	User Capacity
IBM	AS400		1031275	0 - 80

The above described software will be maintained under V5 R4 or greater of the IBM iSeries OS/400 Operating System.

SCHEDULE B APPLICATION SOFTWARE SUPPORT SERVICES FEES

	12 Month Agreement Fee	
Product/Module Description/Version	Date Range	US Dollar Amount
eCAM / Property Assessment Administration System /	05/01/2008-04/30/2009	15,300.00
Apex Sketching Software	12/01/2007-11/30/2008	5,335.00

Total Amount for Agreement Period

20,835.00

Unless otherwise stated within this Agreement, higher computer capacity environments other than that specified in Schedule A will require a Support Services Fee Upgrade. This fee will be the difference between the current fee being paid by the CLIENT and that fee established in accordance with Article 9. (a) of this Support Services Agreement for the software and/or modules listed above.

EXHIBIT C: APPLICATION SOFTWARE PRODUCT DESCRIPTION

Hamer Enterprises®

Computer Assisted Mass Appraisal, Assessment Reporting and Appraisal/Assessors Office Administrative System

eCAM Version 4 Release 1

Software Product Description (SPD)
As of 01/01/2007

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Integrated Products

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Portions of manuscript and automated CAMA methodology within this text originated through published IAAO standards.

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eCAM/RE (REAL ESTATE)

1.1 Introduction

Has implementing the best business practices and/or automation into your in-house procedures been on your mind? Whether you are a computer novice just beginning your journey through Appraisal and Assessment Office automated solutions or an old pro looking to bring your office up to the latest computer technology and automated assessment/appraisal strategies, there are key issues in selecting an Automated Solution which require your insight, fore-thought and just plain "asking the right questions".

Through the years, we at HE have found that if you, the potential user, solicit responses to a few key issues NOW -- it could save you much anguish and embarrassment -- not to mention time and money, in the long run.

Our Computer Assisted Mass Appraisal, Assessment Reporting and Appraisal /Assessors Office Administrative System (eCAM), incorporates all of the dynamic features listed in this document. This section of this document has been compiled for the County's benefit in order to help you assess other Property Management / CAMA Automated Solutions with these key Automated Features in mind.

The HE Appraisal Management System, eCAM is a very efficient, user friendly, circumstance/category table/code driven system — utilizing the cost, market and income approaches to value. eCAM incorporates many effective tools to better prepare the Appraisal/Assessment Office to deliver an excellent, viable product to its entities and its taxpayers. eCAM is table driven; therefore circumstance and category coding fields are prevalent throughout the system. **User defined coding fields** give the tax professional freedom to define in a consistent manner, ALL features of the land and improvements, as well as ANY circumstance or event surrounding the "account" in whole or part. The feature allows for efficient, consistent and complete report writing, form letter writing and document design.

eCAM incorporates the latest in "pop-up" window technology. Through the use of specific function keys, pertinent information regarding a field's use and content is instantly at the tax professional's fingertips. If the user is unsure as to how a specific field interacts with eCAM, they simply press the <HELP> key. By pressing the <HELP> key, a description of the current field may be obtained, defining the type of information to input and its interaction with the other fields.

If the tax professional's cursor is located in a "coding field" which interacts with a table, the user simply presses the <TABLE> key to display the contents of the applicable table. Once the table "pops-up" on the terminal, the user simply chooses from the available options. These added eCAM functions take the guesswork — which has been the cause of many valuation errors in the past on comparable systems — away from the data entry session.

During a data entry or data audit session, the eCAM user has the flexibility to move among eCAM's screens in order to adequately define and appraise, as well as analyze, the host account. Each screen logically flows to the next and all screens are accessible to each other with the simple touch of a function key.

1.2 Screens

- Master Screen
- Sketch/Improvement Characteristics via ApexSoftware[®]
- * Improvement Additions Screen
- Other Features Screen
- Land Screen
- Income Approach Screen
- Mineral/Special Appraisal Screen
- Value Correlation Screen (Cost, Market, Income, Correlated)
- Sales / Account History Screen
- Comparable Properties Screen
- * Account Status Screen
- * Entity Tax Screen
- * Account Notes Screen
- * Event and Instrument Tracking Screen

1.3 General Features

- * Completely menu driven
- * Full GIS Integration
- * Automated Cost, Market and Income Approaches To Value
- Extensive Discounted Cash Flow Analysis
- * "Pop-up" HELP windows for field and coding definitions
- "Question and Answer" Display and Reporting Utility
- * Complete Sales Analysis and Value Comparison Modules
- * Complete On-line Sketching via ApexSoftware® that includes multiple degree angles in either a vector or non-vector format
- Automated Mass Land Appraisal utilizing per acre, square foot, front foot and flat pricing techniques
- Interactive form letter processor
- * Review Board scheduling and tracking
- A Wide Range Of Reporting Capabilities
- * Automatic Ag Roll Back Utility

1.4 General Benefits

* SECURE DATA: HE has in its software conversion library, a comprehensive set of object oriented conversion programs—which are

proven and tested. Thousands of man hours have gone into these established programs which provide for a quick and secure data conversion from your present data storage and automation system, into the QUICK and THOROUGH Distributive Database Architecture of the EZ-Product Line. This is a MAJOR cost and time benefit and should be heavily considered on the current bottom line—as well as the five year cost of ownership. Not only for cost efficiency—but system and data integrity.

- * Very Easy-To-Learn-And-Use Report Writing, Tape File and Database Building Utilities which efficiently step the novice user through single and multiple file database reports, available field selection, creating fields and testing against them, included record selection criteria, sorts and subsorts, subtotals and grand totals, multiple line listings, customizing report headers and cover pages, adding a database or report utility to YOUR menu and much more.
- * Very Easy-To-Learn-And-Use Form Letter and Document Design Utilities which efficiently step the novice user through full word processing capabilities - dictionary, thesaurus, grade level checker. Automatically merging the data in your real estate and personal property tax files with the form letters you wrote, or documents you designed. Available field selection, creating fields and testing against them, included record selection criteria, sorts, subsorts and much more. Once you have a form letter boiler plate as you like it, you may add it to YOUR menu.
- * Full Residential and Commercial "What if..." Cost, Market, Income Analysis On individual properties and in mass.
- * Event and Instrument Tracking: ANY event, from phone calls to appeals may be tracked through this module. ANY letter, document, or form created by YOU, may be sent to a tax payer and tracked as well. ANY letter, document, or form which corresponds to an event or action code may automatically be sent to the tax payer and tracked by the system.
- * Provide the Appraisal Office with the ability to "talk" to the computer through a highly efficient, menu driven question and answer session, where the tax professional may ask a question pertaining to any condition or field in the database and have the textual result (answer) depicted on the terminal or printer -- or graphically depicted on an automated graphing or mapping/GIS system.
- * EXTREMELY FAST Processing benchmarked at processing 60,000 parcels per minute.
- * Tools to highlight problem areas or "bias" in the County in order to place resources in critical areas -- instead of labor intensive "county-wide" revaluation's -- or "shotgun" approach.
- Tools to correct data through automatic land and/or improvement location multiplier estimators and schedule builders.
- * Automated Personal Property Appraisal SIC based IBI modeling, cost table valuation and automated asset trending and depreciation techniques.

Personal property appraisal module has the ability to accurately and efficiently value all categories of Personal Property -- Inventory, Furniture and Fixtures, Machinery and Equipment, Lease Hold Improvements, Mobile Homes, Computers, Vehicles and more -- as well as being linked to accounts found in our real estate system.

- * Allow the system to take the "remembering" and the "guess work" out of the high level and state mandated activities. Based on conditions in the file, high level and state mandated functions are automatically performed.
- Cut down on possibility of costly errors.
- Labor efficiency Property Record Cards, Appraisal Recalculation and other commonly processed tasks at the touch of a button.
- * Create a more productive and efficient data entry environment.
- * Free up personnel to perform other critical office and field related tasks and alleviate the need for additional personnel to be hired, or overtime to be accrued.
- Immediate State mandated updates, keeping the Appraisal Office completely in compliance with the Tax Code.
- * Bar Chart (Valuation Method Correlation), Pie Chart (Property Category Distribution), Line Graph (Land Size Increase/Unit Price Decrease Analysis) data available for graphing capabilities for daily, weekly, monthly and annual reporting using any third party products (not supplied by HE) which provides such functions through either a direct connection or an ODBC/JDBC connection to the data.
- Save literally tens of thousands of dollars in printing and mailing services by taking advantage of HE's array of 50+ PPM in-house laser printers and their complementary mail room service interfaces.
- Provide the District with a higher integrity product to their Taxpayers.
- * Provide the District with a clean, concise means of tracking, posting, auditing and reporting on value estimates and taxes -- as well as promoting equity.
- Allow the District to position itself now for future use of optical scan imaging, automated field cards and other state-of-the-art tools on today's drawing boards.
- * On-line History and Multi-year processing. Allowing the CAD to work on a reappraisal WITHOUT being locked out of their files for months.
- * For a detailed listing or presentation of the dynamic features of the eCAM Solution, please contact an HE or IBM Development and Support Center near you.

1.5 Administrative Features

Easy to use on-line menu builder.

- Completely menu driven (Database Management, Tables Maintenance, Reports and Utilities)
- * HotKey and Acronym FastPath capabilities for immediate access to often used documents, screens and menu line items.
- * Security file maintenance and incremented "user rights" levels at the Main Menu, SubMenus, Menu Line Item and Screen level. Through the use of a "Sentry File" the designated Security Manager has the ability to assign a unique set of rights to each user which will enable them to perform their assigned tasks within the system. The security file contains the user's name and unique ID, along with the following multiple entry fields (1) menu names, (2) menu line item options, (3) DBM screen names, (4) passwords and (5) access rights, as defined by the Security Manager. For example, a given user may be assigned a read only login. Such a login would allow this user to view the data associated with a subject account, but not allow any updates, etc. The Security Manager may assign any of the following system rights alone or in combination:
 - Read Only Allows the user to view the data associated with an account. The system will not allow the user to write the data back to the disk. The system will not update the User ID or Last Update Date on the Status Screen running under this option.
 - Update Allows the user to make changes in an already existing account.
 - Add Allows the user to create new accounts.
 - Delete Allows the user to delete accounts.
 - Menu Access Allows the user to access a menu line item.
 - Screen Access Allows the user to access a particular DBM screen.
- * Menu Driven Partial System and Full System Backup -- Daily, Weekly, Full File. Also "Save while active" parameter.
- * Automatic Deed Processing -- including automatic transfer of ownership and sales data, automatic "mark for notice" and "mark for exemption audit",
- * Ability to table load owners names and addresses by owners code OR type in names and addresses independently without the use of owners codes. eCAM/RE provides for the expeditious entry of multiple property owners, (those who own many properties within the boundaries of the jurisdiction), through Owners Code processing. The Owner ID Code is a 3 character, alpha numeric field, with an active table key. This functionality is very useful in the production of state or high level mandated reports, mass mailing address changes by owner and bundled mailings. This field is tied to an owner's code table which holds codes, names, main and alternate mailing addresses and phone numbers. The input of a valid ownership code "writes" the associated address information to fields 02-07. This aids in the processing of clear, clean, consistent mailing addresses for large property owners.

- * The majority of owner's in a given property management database own a single property, therefore it would be very inefficient and unnecessary, to use Owner's Code Processing in this situation. eCAM/RE efficiently allows for the single entry of name, address, city, state and zip code directly into the database fields in this situation -- thus alleviating time consuming redundant table/database entry for a single property owner.
- * eCAM/RE complies with CASS Certified Mailing Address Standards. In March 1993 the Federal Government awarded HE the "Coding Accuracy Support System Quality Certification" Designation. What this means is that HE is now qualified, through their software, to not only accurately and efficiently maintain records, but automatically enhance the integrity of YOUR property based information as well.
- * As of March 21, 1993 all bulk mail parcels must include a carrier route ID, as well as spelling and abbreviation standards associated with Street Directions, Street Names and Street Types, in order to qualify for the GREATEST POSTAGE DISCOUNTS with the U.S. Postal Service. This process is called "CASS" certification, (Coding Accuracy Support Systems) and the mailing addresses in your database must "pass" this certification before every mailing after March 21st in order to obtain the greatest discounts. This will affect ALL mailings from this day forward -- not only for you, but for all of the entities for which you supply "the mailing address". For more information about CASS Certification, please contact the Hamer Enterprises/HE Services Group.
- * A 10 Character Situs Code is provided. This field is tied to a Standardized Situs Code Table. Once Situs Codes are assigned for all or part of the streets in the District, eCAM/RE will load the Street Direction, Street Name, Street Type and Street City in a consistent, standardized manner. Not only does this add to the integrity of the Property Location Address and the Search By Location Function, but increases throughput of data entry when in "create" mode. For example: If Situs Code "101" represents West Mill Creek Road, Los Angeles -- one can create a situs code table record for "101" with the appropriate Street Direction, Street Name, Street Type and Street City tied to it. When the operator types 101 in the Situs Code, the standardized and approved Street Direction, Street Name, Street Type and Street City (if applicable) are automatically written to the record.
- True Multi-Year Processing Future and Past
- * The following outlines the eCAM/RE Account QuickSearch Utility:
 - When adding new accounts to the database the user need only input a unique account number. The system will then verify the length and uniqueness of the number and then allow the user to add the record. For the purposes of updating and deleting accounts, there are three methods of retrieval:
 - If the account number is known, the user simply enters the number followed by [Enter]. If the account number is on file, eCAM/RE will pull up all the associated data and place the user in "update" mode. If the

- account number is not on file, eCAM/RE will place the user in "add" mode.
- If the account number is not known, the user may press the [F16] key to invoke the Inquiry Screen for additional search options. Once the Inquiry screen is invoked, a prompt will appear listing the following search options: [A]ccount Number, Alternate [K]ey, [N]ame, or [L]ocation. The user then chooses a search option by entering the bracketed letter of the search option followed by [Enter].
- Upon selection of either the [A]ccount, Alternate [K]ey, or [N]ame search option, the user enters the search string. This will bring up a listing of all accounts which directly match the search string. If the search option was "[N]ame" and the search string was "SMI", the listing would bring up all accounts where the owners name began with "SMI". Likewise if the selected search option was "[A]ccount" and the search string was "B1223", the listing would bring up all accounts where the account number began with "B1223" and so on.
- Upon the selection of the [L]ocation search option, the user is prompted for Street Number, then Street Name, the Location City. An [Enter] will enact a partial search string and Inquiry will match all Street Numbers, Street Names and/or Location Cities it can and display records matching the string in address order. For instance, if you wish to see 1241 Astoria, you should type "1241" when prompted for Street Number and "Astoria" when prompted for Street Name. If you wish to see the 1200 block of Astoria, you should type "12" when prompted for Street Number and "Astoria" when prompted for Street Name, and so on.
- The following information is displayed per account: (Column 1) Selection line #, (Column 2) Account #, (Column 3) Name and (Column 4) Parsed Location. If there is a large volume of accounts which match the search string, the user may move forward and backward by using the [F13] and [F12] keys. Once the subject account has been located, it may be brought to the Master Screen for verification by entering the applicable line number followed by [Field Exit]. The system then severs the Inquiry tie and the selected account is made available for update.
- [NEXT SCREEN] Key ([F13]) and [PREVIOUS SCREEN] Key ([F12]) Note: By selecting an alternate inquiry option, the user "redefines" the [NEXT SCREEN] and [PREVIOUS SCREEN] keys. If the user accesses the account via an account number, the [F13] key accesses the "next" account in account number order. If the user accesses the account via an owner's name, the [F13] key accesses the "next" name in name order, and so on. The same logic applies to the [F12] [PREVIOUS SCREEN] key.
- * Hardcopy and On-line System Documentation with key word search and chapter inquiry. The eCAM/RE Hardcopy and On-line CAM System User's Documentation is updated quarterly and distributed throughout our user network in both hardcopy and machine readable form. The machine

- readable documentation is downloaded into our EZ-DOC[∞] utility for immediate user access.
- Complete On-line "Help" through "point and touch", question and answer and field prompting.
- * On-line "Help"? Cursor Sensitive.
- * Field by Field (opposed to Screen by Screen) data verification. Through our proprietary "FIELD ACCESS" program coding techniques, we have transformed the data entry session into a true interactive session. HE has developed intelligent processes to efficiently interact with the host system's "Native" utilities to provide the user with instant field entry answers -- NOW -- when the tax professional most needs them. Typically, in other data entry scenarios -- on other vendor's systems, the user has to wait until the entire screen is filled out and completed before he knows if the data he inputted ten minutes ago is valid. If the professional's cursor is located in a "coding field" in an EZ-Product which interacts with a table, the user's entry is INSTANTLY validated, adding efficiency, reliability and saving much time and hard cost at the data entry or inquiry session.
- * On-line access to coding tables from database coding fields utilizing new "pop-up" window technology (without exiting to menu). eCAM/RE incorporates the latest in "pop-up" window technology. Through the use of specific function keys, pertinent information regarding a field's use and content, is instantly at the professional's fingertips. If the user is unsure as to how a specific field interacts with eCAM/RE, they simply press the <HELP> key. By pressing the <HELP> key, a description of the current field may be obtained, defining the type of information to input and its interaction with the other fields.
- * If the professional's cursor is located in a "coding field" which interacts with a table, the user simply presses the <TABLE> key to display the contents of the applicable table. Once the table "pops-up" on the terminal, the user simply chooses from the available options. These added eCAM/RE functions take the guess work -- which has been the cause of many valuation errors in the past on comparable systems -- away from the data entry session.
- All eCAM/RE Systems are delivered with a complete set of base models, cost schedules and other Real Estate Property Characteristic and Coding Tables.
- Client/Server, Personal Computer utilizing an *included* Graphical User Interface (**GUI**) component of the application software. This component of the software provides for spread sheet, word, document and form processing and database management -- including system interface for off loading information for PC based form letters, event tracking, Automated ARB/BOE processing, image retrieval, tracking, and etc. With the included GUI component (**EZ-GUI**), eCAM is now transformed to both a WindowsTM and Web enabled solution. Moreover, beyond providing full <u>desktop</u> <u>integration</u> with all PC based applications, i.e., GIS serving, Image serving &

etc., EZ-GUI provides an additional method for easily incorporating workflow engineering without in some cases, having to modify the source code. As a result, inheritant with this GUI module eCAM is now enabled to integrate with multiple independent systems operating with multiple types of operating systems thereby optimizing an enterprises investment in preexisting best-ofbreed ancillary solutions. Consequently, with this included component eCAM becomes the conduit for unifying all desktop solutions that a client may find necessary to use throughout its daily operations with the core solution, eCAM. And finally, when a client is ready to consider the option of transitioning off of the server box or even the desktop to the "Internet cloud", the client will find that the foundation for making this transition is already in place (this transition could also include an optional wireless-to-web Therefore, when examing the included EZ-GUI component as well). module, the user should view this from two perspectives; first as a Windows-to-host solution and second as a web-to-host solution. important, all of this functionality is operating under the security of the IBM host security system (iSeries Server - previously trade marked as the AS/400), which carries the Defense Departments C2 level of trust.

- * OCR Fonts A & B, as well as all bar code scanner interfaces for Exemption and Agriculture Application Processing, Personal Property Rendition/Return Processing and other form mail/entry processing.
- * After accessing an account, <u>all Database Management screens</u> are accessible to one another with the simple touch of a function key. The eCAM/RE system consists of a variety of screens and program tools, each of which is designed to flow logically to the others. To move among the screens present within the eCAM/RE system, the user simply presses the appropriate "Screen Options" key. When this key is pressed, the Sentry file is checked for user security clearance and a listing of real estate screens which are available at the user's security clearance level, will window on the terminal.

1.6 Improvement Management Features

The following features apply to Segmented, Segregated and Market Influenced Cost Approach procedures.

- Up to 99 "classed" improvements on a single account (without redundant ownership data). Each capable of holding its own sketch and up to 999 additions and 999 other features.
- * Market influenced residential classification cost schedules/models. As well as utilities to tell the user if there is "bias" in the schedules and models as well as what they need to do to correct it.
- * Market influenced commercial classification cost schedules/models. As well as utilities to tell the user if there is "bias" in the schedules and models as well as what they need to do to correct it.
- * Automatic lookup of Area Perimeter Multipliers and Wall Height Multipliers following standard M&S methodology for Commercial Improvement Valuation

- * Automatic lookup of Local Area Multipliers based on standard M&S methodology (Improvement types A, B, C, D, S, Frame and Masonry)
- * eCAM/RE distinguishes between living area (heated and cooled area) vs. non living area. Most appraisal systems go to the table for lookup with just the "Main" area or the "Main" plus ALL additions including garages, slabs, open porches, etc. This of course produces erroneous results leaving the Assessment Office exposed during the appeals process. There are two types of addition codes in eCAM/RE, those which start with the letter "M" and those that don't. The system recognizes additions with a "M" in the first character of the additions code as being "Part of the Main" Living Area. The sum of Main Adjusted Area from the Improvement Satellite Screen and the total area of all Mxx additions is considered the Living Area. This is the number (Living Area) which is used to look up the rate in the cost tables when utilizing the Cost Approach. This is also quite useful for those additions which have different number of stories than the MAIN, but were built at the same time as the MAIN and of similar quality.
- With regard to the functionality of property sketching, eCAM supports this exacting demand by utilizing the dedicated experience of its mass appraisal sketching business partner, ApexSoftware®. ApexSoftware® possesses over 2 decades of experience that has been exclusively dedicated to the development of mass appraisal property sketching. ApexSoftware® software products are PC-based sketching solutions that allow the user to create and edit existing improvement sketches in a visual-oriented environment both in the office or in the field. The user is able to draw the sketch as either a vector or non-vector view. By using the user's mouse and easy to operate imbedded utilities the user can not only perform the base function of sketching a property, but also create enhanced views that include such functions as: dragging and dropping symbols on the sketch, insertion of text labels, splitting an area on the fly (i.e., splitting the garage structure from an overall area sketch), the creation of a 3D rendering just to mention a few. Moreover, if an assessor has access to such augmented tools as digital imagery (i.e., plat maps or aerial photography) the user can overlay their sketch with the image. Then by using the ApexSoftware[®] Photometric process the user can then trace a lot line or a wall of a building, input a known distance and the lines of the sketch will then automatically scale, thereby allowing the user to accurately and easily draw the remaining aspects of the sketch. Additionally, the user can even use blue prints, scanned floor plans or hand drawings to trace directly on top of the source. thereby making the best use of all paper files that maybe available. Finally, ApexSoftware® in conjunction with the eCAM conversion team also provides eCAM clients with a full range of conversion services for all existing legacy sketch data. These are only highlights of a few of the robust sketching functions and services that are available to eCAM users through our allied relationship with ApexSoftware®.
- * Physical Condition may be independently user driven, or automatically loaded through the Typical Life and Effective Age Tables.

- * When valuing additions using "a percentage of the Main", the percentage adjusts the rate in the Cost Approach equation, not the square footage.
- Value Overrides are available for the main improvement, its additions and its other features (ie. swimming pools, fences, asphalt, etc...). They include [T]able Rate, User [R]ate Override, [P]ercentage of the Main Override, or [F]lat Value Override.
- * During the tax year, it is very useful for the Appraiser to have the ability to "fine tune" appraisals -- this is especially true during the Hearing process. eCAM/RE includes a "What If" Improvement Adjustment Screen, which facilitates IMMEDIATE on-line improvement valuation adjustments (without the need for a time consuming "RECALC"). This "What If" option can be reviewed and updated to the record or be cancelled without effecting the original record's data based on any one, or a combination of the following user inputted fields:
 - Improvement Class
 - Rate
 - Rate %
 - Improvement Type (A, B, C, D, S, F, M)
 - Effective Age
 - Typical Life
 - Physical Condition Percent Good
 - Economic Obsolescence
 - Functional Obsolescence
 - Percent Complete
 - Sketched Area or User Inputted Area
- eCAM/RE includes <u>Multiple</u> Building Permit Information including: Permit Number, Permit Amount, Project Number, Date Issued, Permit Description and value.

1.7 Site/Land Appraisal Management Features

- * 999 Multiple Land Segments per account. This function facilitates multiple valuation methods on any single account, (ie. by square foot, front foot, acre, lot, flat, etc...). This function also facilitates multiple agriculture and timber use on any single account, (ie. crop, pasture, railroad right-of-way, orchards, etc...)
- * The ability to determine market value on any one or all land segments individually or in mass utilizing flat value pricing, per acre pricing, per square foot pricing and/or per front foot pricing with automatic Standard Depth and Depth Factor look-up.
- * The ability to adjust individual land segments and/or the total land account (through table driven adjustments or user override), for shape, view, obsolescence, utility easements or other enhancements or detriments to the site. The reason for adjustment is table driven as well.

- * During the tax year, it is very useful for the Appraiser to have the ability to "fine tune" appraisals -- this is especially true during the Hearing process. eCAM/RE includes a "What If" Land Adjustment Screen, which facilitates IMMEDIATE on-line land valuation adjustments (without the need for a time consuming "RECALC"). This "What If" option can be reviewed and updated to the record or be cancelled without effecting the original record's data based on any one, or a combination of the following user inputted fields:
 - Valuation and Unit Type (Acreage, Square Foot, Front Foot, Per Lot, Flat Price)
 - Market Code (Quality/Geo Code bridged to size/rate models)
 - Ag Code (Ag and/or Timber Type/Quality/Geo Code bridged to size/rate models)
 - Frontage or Depth
 - Number of Units (Acres, Square Feet)
 - Table Driven Market Rate or User Override
 - Table Driven Segment and Overall Adjustment Codes/Reason Descriptions and Percentages, or User Override.
- * eCAM/RE incorporates a "Contiguous Land" or "Part of a larger" automatic link utility and an on-line and batch valuation processor. For Example if one ranch or orchard is carried as one 1000 acre account with a single account number and another ranch or orchard is carried as ten, 100 acre accounts with ten individual account numbers, eCAM/RE has the ability to link the ten, 100 acre accounts together, do an automatic land model look-up individually or in mass and determine the market value of the ten accounts as though they were one.
- * In order to accurately appraise large tracts of land such as described above located on multiple accounts, eCAM/RE incorporates Automated Contiguous Land Valuation Utility Landlink^g.
- * The Automated Contiguous Land Valuation Utility traverses the data base and based on like "Land Link Codes", parts of larger tracts are linked together and valued as one. Once a LLC is assigned to a set of properties, the Automated Contiguous Land Valuation/Insertion Utility sums the acreage's of all accounts with "like" land link codes. This sum, the Linked Acreage, is then written to the LandLink® Code Table (CRTACR) for all LandLink® codes which hold a "C" in the User Flag and is used in conjunction with the individual segment's Market Code to look up a rate per acre in the associated Market Acreage Tables. This valuation process is based on the aggregate size of the contiguous tract, or other land mass rather than the single segment's acreage. This is done on a individual land segment level.
- * The user may override the linked acreage amount for a coded contiguous tract which the LandLink^g Utility has computed by updating the LandLink^g Code table (CRTACR). The user may place a "U"ser override flag into the table adjacent to the code, as well as place the desired contiguous acreage

in the adjacent slot. The "U" will "block" the LandLink[®] utility from updating the code's acreage and the user-overridden acreage will be used in Land Segment Rate look-up. It is important to note that either a "C" or a "U" should be adjacent to each LandLink[®] code in the table.

This powerful utility allows the appraisal authority to accurately reflect market value on large tracts who would otherwise be priced as small acreage tracts -- thus treating "Equals Equally".

- Provides the ability to determine agriculture and timber value (separate from Market) on any one or all land segments individually or in mass utilizing flat value pricing or per acre pricing
- eCAM/RE holds up to 999 years (most states require 5) of ag/timber deferments to facilitate automatic ag roll back processing.
- * Offers on-screen updating totals of ALL land segments, including Overall adjustments, Total Market Value, Total Ag/Timber Value, Total Deferred Value, Total Acres, Total Linked Acreage, Contiguous Rate used and Contiguous Amount (if involved in Contiguous land processing).

1.8 Market Approach, Schedule Building & Adjustment Tools

- Provides the ability to extract sales information from the large Data Base into a smaller Sales File for faster Sales Ratio, Value Comparison Analysis and Comparable Property Processing
- * The ability to combine accounts pertaining to a single sale
- The ability to code for Land only and Improvement only sales
- * The ability to selectively extract information by range, sales information integrity, Land Use and State Code Category, Class Category (6, 7, 8, RV, RF, etc...), Actual Class (6+, 6, 6-, RV4+, etc...)
- * Once the sales are in the Sales File, eCAM/RE provides a database management feature in order to adjust any data variable in the file (to adjust the sale to the time of appraisal, flag outlyers for exclude/include in study, etc...). eCAM/RE further allows supplements to the sales file with fee appraisals or sales outside of the host jurisdiction for categories with little or no sales information.
- * eCAM/RE facilitates unlimited combining of statistical groups (ie. class within boundried jurisdiction or neighborhood, land use/state code within school district, class within state code, class within overall County, etc....).
- * The statistical grouping options are user selective, not hard coded.
- * During Sales and Value Comparison Analysis, one may stratify by:
 - Sales Date Range
 - Sales Price Range
 - Entity/Jurisdiction
 - Map Number
 - Neighborhood

- State Code
- Improvement Quality Class
- Sales Information Source
- Sale Type
- * Many Equality tools such as Statistical Sorted "Bias" Recognition Reports for Location, Age, Improvement and Lot Size, as well as Improvement Quality Class.
- * Through eCAM/RE's appraisal accuracy and equalization tools, one may test for improvement quality bias and location bias. The user is automatically given an adjustment modifier based on sales in the area which "best hits" the user inputted target measure of central tendency and measure of dispersion. The user may then apply the system derived modifier to the individual land segments in mass, the Improvement Class Schedules, or the Area Land schedules.
- * The eCAM/RE Sales Ratio Reporting Features include:
 - Detail Report in ascending account number, square foot sales price, square foot appraisal price and/or ratio order.
 - Statistics Report based on the Median and/or Mean including:
 - ⇒ Aggregate Appraisal
 - ⇒ Aggregate Sale
 - ⇒ Weighted Mean
 - ⇒ Price Related Differential (PRD)
 - ⇒ Mean and Median Ratio
 - ⇒ Average Deviation (Using the Median or Mean)
 - ⇒ Standard Deviation (Using the Median or Mean)
 - ⇒ Coefficient of Dispersion (Using the Median or Mean)
 - ⇒ Coefficient of Variance (Using the Median or Mean)
 - ⇒ High Ratio for group
 - ⇒ Low Ratio for group
 - Frequency Distribution Report (Bell Curve)
 - Value Range Stratification Report
 - Value Audit Impact Study Report
 - On-line Report Writer for Unlimited Report Writing
 - As stated earlier, Statistical Sorted "Bias" Recognition Reports for Location, Age, Improvement and Lot Size, as well as Improvement Quality Class.
 - Through the Residential Market Approach, the Sales File holding high integrity sales and comparable property information may be used to actually estimate the value of "like" subject properties within the CAMA system population.

- eCAM/RE allows for the automatic selection, on-line display and comparative valuation of up to four "Comparable" Properties for any subject property in the database.
- eCAM/RE allows one to automatically review "sold" properties or high integrity appraisals, which are similar to the subject property for comparison of uniformity and accuracy of appraisal.
- eCAM/RE mathematically generates an estimate of the Market Value of the subject property via comparison to sales and appraisals of similar properties.

1.9 Income Calculator & Model Approach

- * Income Calculator:
 - An Income Calculator is available for any individual account.
 - The user may input Vacancy and Collection Loss expressed as a percentage OR a flat value.
 - The user may input Expenses expressed as a percentage OR a flat value.
 - The following methods of on-line Cap Rate development are available through your Income Calculator.
 - ⇒ Comparative Market
 - ⇒ Band of Investments
 - ⇒ Equity Yield
 - ⇒ Physical Component/Residual
 - ⇒ Financial Component/Residual
 - During the tax year, it is very useful for the Appraiser to have the ability to "fine tune" appraisals -- this is especially true during the Hearing process. eCAM/RE includes a "What If" Income Method Adjustment Screen, which facilitates IMMEDIATE on-line valuation via the Income Approach adjustments (without the need for a time consuming "RECALC"). This "What If" option can be reviewed and updated to the record or be cancelled without effecting the original record's data based on any one, or a combination of the following user inputted fields:
 - ⇒ Potential Gross Rent
 - ⇒ Vacancy and Collection Loss
 - ⇒ Secondary Income
 - ⇒ Effective Gross Income
 - ⇒ Allowable Expenses
 - ⇒ Reserves For Replacement
 - ⇒ Net Operating Income
 - ⇒ Estimated Remaining Life
 - ⇒ Annual Recapture Rate
 - ⇒ Overall Recapture Rate

- ⇒ Composite Tax Rate
- ⇒ Overall Cap Rate
- * Model Driven Mass Income Approach:

The Model Driven Mass Income Approach is comprised of segmenting and summary screens which are used to list and define the income and expense characteristics of all income producing real property associated with a given account.

- Differing from the Income Calculator, which is used as an independent worksheet, this screen allows the user to apply Income and Expense streams in mass, by business type and location. Through the interaction of the Income and Expense models, the user may determine the value of selected income producing properties uniformly and in mass. These segmenting screens consist of user inputted, table/model driven and system-calculated fields. Through the segmenting screens of the eCAM/RE Model Driven Mass Income Approach, several quality or unit/mixes associated with a single business type and/or several business types located on any given account may be valued independently, or as a unit, utilizing the Income Approach. This unique function facilitates the mass application of the Income Approach, while preserving the integrity of "Business Specific Modeling".
- Through the interaction of the Income and Expense models, the user may define the "typical" Potential Annual Income, "typical" Annual Vacancy and Collection Loss and the "typical" Expense stream by Unit/Mix within business type (Model). Through the eCAM/RE Income and Expense models, one may also assign unique Cap Rates by Model and Unit/Mix to be applied at the record level.
- The user has the flexibility to code Models uniquely by Model ID, as well as Location.
- The user has the flexibility to code unlimited Unit Type by Quality Category and Mix Type uniquely within each Model.
- The user has the ability to define, list and apply unlimited "available" Quality/Mix Codes by model. By pressing the table help key [F20], the user may window all Quality/Mix Codes associated with the host Model and Location ID for availability, as well as all other model specific variable data. This field is used to code and describe the different types of quality square footage's applicable to office buildings, warehouses, etc. -- or different bedroom/bathroom mixes applicable to apartments, hotels, etc. -- as well as many other model driven quality/mix types. Once the user inputs this code, eCAM/RE writes the Description associated with this code in the host model to the Income Segment data set's description field. This code is then utilized throughout the income account's existence for Model Segment Income and Expense data lookup, to be associated with this Income Segment record's data set.
- The user has the ability to define the Unit of Measurement by model.
 This is used as part of the model header identification information. This UOM Code is pulled from the appropriate model to define the Unit of

Measurement applicable to this type of Business/Model. For example when your model is valuing based on price per unit (Apartments, Hotels), the <UOM Cd> may be "UNT" and the Income Segment Quality/Mix Code and Description will display a code/description such as (211) "2 Bed Rooms, 1 Bath, High Quality". If your model is valuing based on price per square foot (Office Building, etc.), the <UOM Cd> may be "SF" and the Income Segment Quality/Mix Code and Description will display a code/description such as (OS1) "High Quality Office Space", or (OS5) "Shell Space". You may further define your models based on price per chair (Barber Shop, Salon, etc.), price per pump (Gas Stations), and so on. This allows great flexibility and "appraisal creativeness", without locking your office into hard coded program driven functions. This field is updated upon the entry of a Model ID/Location ID key.

Other Real Estate Property Management Features

- "Pass Through" data processing is a functional practicality between eCAM/RE and PC based GIS technology through GIS keys and interfaces.
- HE is successfully coexisting with several GIS firms on multiple GIS hardware platforms. We are currently accomplishing this in a workstation environment utilizing <u>ULTIMAP</u>tm software on Apollo workstations as well as <u>MAPWARE</u>tm and <u>ATLAS</u>tm software in the PC environment. We are in the process of bringing our design and GIS Interface techniques to the PC based E.S.R.I. ArcInfo using the OS/400 database <u>without redundant storage of data</u>. GIS to EZ-Product Functions Include:
- Point-and-click query of data residing in eCAM/RE. Example: Who lives on this parcel? What class of improvement is here? What is the land value?
- Spatial Windowing and Linear Selection of parcels for group data update and manipulation from eCAM/RE. Example: I want to apply a 10% economic obsolescence factor to every parcel located in eCAM, which is within a 200 feet radius of this proposed landfill. What would this do to the value in the area? Or... I want to apply a different Front Foot pricing land schedule to all property along this highway.
- Parcel Segregation's and Combinations (Cuts and Merges). Example: The ability to cut a parcel through GIS and automatically "set- up" the new parcel in eCAM/RE, as well as establish the pointers for ancestry tracking of tracts and lots.
- Parcel Selection by eCAM/RE Cobol Modules for graphic depiction.
 Examples Include:
 - ⇒ Comparable Property Analysis
 - ⇒ Neighborhood Integrity Audits
 - ⇒ BOE/ARB Appeals Analysis
 - ⇒ Sales Ratio Analysis

- Undivided Interest on Land, Improvement, or Both Land and Improvement
- MANY utilities and best business practices integrated into eCAM/RE take the "remembering" and the "guess work" out of high level or state mandated activities. Based on conditions in the file, high level or state mandated functions are automatically performed.
- eCAM/RE holds Pre-hearing and Post-hearing values in order to statistically analyze strengths and weaknesses during the hearing process.
- Automatic retrieval and correlation of Values determined by the Cost Approach, Market Approach and Income Approach, in order for individual or mass loading of "Correlated" Appraisal Estimates.
- On-line access to Current and Previous Year's TAX INFORMATION including Automatic Calculation PER ENTITY of Appraisal Estimate impact on Net Taxable Values and Tax Levy.
- Complete Multi-Year Supplemental Processing and Impact Reporting
- On-line access to Current and Previous Year VALUE INFORMATION including Automatic Adjustments and Supplemental Processing PER ENTITY.
- During Adjustment and/or Supplemental Processing, upon the entry of any field number, the cursor will be positioned first in the Adjustment Code Field. The user may place an Adjustment Reason Code in this field before continuing to the targeted field to make the adjustment. eCAM/RE will capture the net affect of the adjustment to the value as well as the tax for the applicable entities and place the adjustments into the Adjustment File for tracking and reporting. eCAM/RE also assigns an Adjustment Type Code and an Adjustment Number to the Adjustment and, along with the Adjustment Reason Code assigned by the user, categorically processes and maintains the supplement or adjustment.
- Unlimited Area Codes and Tax District Codes and associated Taxing Entity Tables holding Contact Names, Return Addresses, Rates, Exemption Codes and Exemption Worth to the Entity (including local options), Discounts for early payment of taxes, etc.
- Provides full system integration and data passing to eTAX, the HE Tax Billing, Tax Collection, Tax Entity Distribution and Auditing System. eCAM and eTAX are <u>totally integrated</u>. To understand the term "integration" one must consider the alternative.
 - Alternate "Combined System" Approach: Most software vendors practice what is many times referred to as an "integrated approach", but is really a "combined approach". For instance, an Appraisal or Assessor's System is developed by one set of programmers in one part of the Country using their adopted standards, terms, logic, screen design, etc. A County Tax Office System is developed by another set of programmers in another part of the nation using their standards, terms, logic, screen design, etc. Some years later, after both systems are complete, they are then patched together to operate as a "whole".

Screens do not work the same, to perform one function in one system you use a certain key, to perform the same function in the other system you use another key. Enhancements and legislative changes become cumbersome because the systems were not written from the ground up to be "integrated" and there is rarely any uniformity. Each system may perform adequately in its own right independently, but in an integrated environment, a "combined" solution is usually never the best approach.

Integrated Approach: HE adopted an "Integrated Approach" of system design and development early in our business life. This means that our systems were built from the foundation up, following a strict set of technical specifications, to insure <u>total integration</u>.

The same System Design and Programming Team developed eCAM and eTAX using strict coding and logic standards. The screens are exactly the same and operate in the same manner, the report prompting logic is the same, the record add/update/delete functions are the same, the purpose of particular function keys in eCAM are the same as in eTAX, the positive/negative logic is the same, the passing of supplemental and correction data is very smooth and efficient, etc. Future enhancements and legislative changes may be performed very efficiently and timely because there is TOTAL consistency between the homogeneous systems.

This increases productivity tremendously. If one knows how to navigate throughout the eCAM system, one can get around in the eTAX system. If one knows what a function key does in one system, one knows for the other, etc. It also places first time users and new employees in production much quicker.

- Abatement processing including abatement profiles. Like most modules in eCAM, abatement processing is a table driven process. Through the use of a unique Exemption Code on the Master Screen, an Abatement Exemption Class in the Exemption Tables and the Abatement record in the Abatement Profile, abatement processing and tracking is accomplished in a very thorough and efficient manner.
 - The Abatement Profile Table is used to list general administrative information and unique abatement information by entity for each record in the Jurisdiction, which is involved in Abatement Processing. If an account holds an exemption code which has an exemption class of "A" in the exemption tables, eCAM traverses the Abatement Profile for the account number and based on the data in the Abatement Profile, an alternate Net Taxable Value and/or levy is calculated.
- Automatic Ag Roll Back
- Automated Effective Tax Rate Calculator
- Control File Builder for reporting. This function allows the user to input or scan a file of account numbers. Once the file is built, the user may "submit" the file to multiple report processors.

- A 999 page free-flow text notes screen is available for each account.
 Field and office notes may be attached to the appropriate account through this segmenting screen.
- Special Coding For Owner History
- Ability to flag for including an account for notice processing by reason code
- Ability to flag for excluding an account from notice processing by reason code
- Ability to flag for "New" Real Estate. This function is used to code property which is considered "new" for reasons such as "annexed" or "omitted".
- Ability to tie account to an agent, as well as log a "what to receive" code by agent code (Instrument Clearance Code). This code is used to designate the level of authority this agent holds concerning correspondence from the District concerning this property.
- Ability to flag for Property "Recheck" (Burned, Exemption, Gate was locked, etc...).
- Ability to code multiple accounts by "Project". This field is used to code real or personal property on different accounts which is located in the same "project". A project can be a mall, strip center, office complex, etc. Through this code, queries may be run, field work assigned and worksheets printed.
- Special Coding For Bankruptcies and Bankruptcy number
- User Defined Reason Codes for special Circumstance
- Special Coding For Supplements
- Special Coding For Late Agriculture and Exemption Application Filing
- Special Coding For Law Suits and Cause Number
- Special Coding For Returned Mail
- Special Coding For Mortgage Companies and Loan Number
- Special Coding For ARB/BOE Processing
- Complete ARB/BOE Scheduling and Processing including automatic Account and Resource Expertise "Matching", Available Resources, Available Time Slots, Available Days
- Event and Instrument Tracking. ANY event, from phone calls to appeals may be tracked through this module. ANY letter, document, or form created by YOU, may be sent to a tax payer and tracked as well. ANY letter, document, or form which corresponds to an event or action code may <u>automatically</u> be sent to the tax payer and tracked by the system.

1.10 Reporting

eCAM/RE Reporting Note: ALL eCAM/RE reports may be viewed on the terminal or sent to a user defined printer.

* Appraisal and Assessment Reports Include:

- Field Worksheets
- Multi-Year Master and Entity Appraisal Rolls
- Multi-Year Master and Entity Appraisal Roll Summary Totals. Aggregate Appraised, Partial Exemptions, Full Exemptions, Abatements, Ag and Timber Deferrals, Net Taxable Values, etc.
- Notices of Appraised Value In-house demand
- Notices of Appraised Value Xerox Laser Format Long Form
- Notices of Appraised Value Xerox[®] Laser Format Postcards
- Exemption Listings
- User Code Reports
- Returned Mail Report
- User Defined Line Listings based on multiple field contents
- Database Reports Including:
 - Recheck Code Report
 - Notice Status Flag Report
 - Hearing Status Code Report
 - Exempt Code Report
 - Undivided Interest Report
 - Ag Penalty Flag Report
 - New Real Estate Report
 - Project Code Report
- High Level Reports Include:
 - Master and Entity Totals incorporating:
 - ⇒ Gross Values
 - ⇒ Partial Exemption Loss
 - ⇒ Deferred Values
 - ⇒ Full Exemption Loss
 - ⇒ Freeze Totals and Loss for ISDs New Construction
 - Top Taxpayers Reports (by user inputted single or multiple State Codes)
 - State Code and/or Land Use Totals Reports
 - Agricultural/Timber Totals Reports
 - Continuous Form Report (199x Format)
 - Value Stratification Report
- * Exception Reports Include:
 - Maximum Value and/or Percent Increase/Decrease Reports
 - Value Tolerance Comparison Reports
 - Value Comparison Ratio Reports
 - Data Field Contents Validation Reports

- Ag/Timber Value Exception Reports
- Code/Table Audit Reports
- * Site Specific Query Reports:
 - Very Easy-To-Learn-And-Use Report Writing, Tape File and Database Building Utilities which efficiently step the novice user through single and multiple file database/reports, available field selection, creating fields and testing against them, included record selection criteria, sorts and subsorts, subtotals and grand totals, multiple line listings, customizing report headers and cover pages, adding a database or report utility to YOUR menu, and much more.
 - Very Easy-To-Learn-And-Use Form Letter and Document Design Utilities which efficiently step the novice user through full word processing capabilities - - dictionary, thesaurus, grade level checker. Automatically merging the data in your real estate and personal property tax files with the form letters you wrote, or documents you designed. Available field selection, creating fields testing against them, included record selection criteria, sorts and subsorts, and much more. Once you have a form letter boiler plate as you like it, you may add it to YOUR menu.
 - The user has the ability to tailor their own Site Specific Query Reports in the Report Menu Tree and their own Site Specific Query Utilities in the Utility Menu Tree through the EZ-MENU Utility.
 - Calendaring is another menu driven function available in the eCAM solution. Reports, utilities and other programs may be scheduled with time and date start/stop options for running in convenient, non-peak periods of computer use. For example, assume you have written a report which you would like to review every Wednesday morning, you have the ability to enter that report into a Calendar and have it waiting for you at your arrival to the office.

2. ECAM/PP (PERSONAL PROPERTY)

2.1 Introduction

The HE Computer Assisted Personal Property Management System (eCAM/PP) incorporates all conventional, as well as advanced methods of Integrated Business Imaging (IBI) Personal Property appraisal. Through SIC based IBI modeling, cost table valuation and automated asset trending and depreciation techniques -- the tax professional adds efficiency, accuracy and most important, defendability, to their Personal Property appraised values. Utilizing simple field calls, this personal property appraisal module has the ability to accurately and efficiently value all categories of Personal Property -- Inventory, Furniture and Fixtures, Machinery and Equipment, Lease Hold Improvements, Mobile Homes, Computers, Vehicles and more -- as well as being linked to accounts found in our real estate system.

eCAM/PP incorporates utilities developed for the tracking, scheduling and verification of leased property, mobile homes, vehicles and more. Through an easy to understand menu driven session, can even build the base schedules and models needed for valuation using site specific data!

eCAM/PP also incorporates the latest in "pop-up" window technology. Through the use of specific function keys, pertinent information regarding a field's use and content is instantly at the tax professional's fingertips. If the user is unsure as to how a specific field interacts with eCAM/PP, the user simply presses the <HELP> key. By pressing the <HELP> key, the user may obtain a description of the current field, which will define what type of information is to be inputted and its interaction with the other fields.

If the tax professional's cursor is located in a "coding field" which interacts with a table, the user simply presses the <TABLE> key to display the contents of the applicable table. Once the table "pops-up" on the terminal, the user simply chooses from the available options. These added eCAM/PP functions take the guess work - which has been the cause of many valuation errors in the past on comparable systems -- away from the data entry session.

During a data entry or data audit session, the eCAM/PP user has the flexibility to move among eCAM/PP's screens in order to adequately define the host account. Each screen logically flows to the next and all screens are accessible to each other with the simple touch of a function key.

The eCAM/PP and eCAM/RE REPORTING utilities are the most extensive and complete reporting tools ever assembled in one appraisal package. For those "often used" reports, EZ-REPORT offers a wide range of pre-defined reports and listings utilized during an appraisal year. With the user defined Report Writer, user defined reports are just a few key-strokes away! This makes your reporting capabilities virtually endless.

2.2 Administrative Features

Easy to use on-line menu builder.

- * Completely menu driven (Database Management, Tables Maintenance, Reports and Utilities)
- * HotKey and Acronym FastPath capabilities for immediate access to often used documents, screens and menu line items.
- * Security file maintenance and incremented "user rights" levels at the Main Menu, SubMenus, Menu Line Item and Screen level. Through the use of a "Sentry File" the designated Security Manager has the ability to assign a unique set of rights to each user which will enable them to perform their assigned tasks within the system. The security file contains the user's name and unique ID, along with the following multiple entry fields (1) menu names, (2) menu line item options, (3) DBM screen names, (4) passwords and (5) access rights, as defined by the Security Manager. For example, a given user may be assigned a read only login. Such a login would allow this user to view the data associated with a subject account, but not allow any updates, etc. The Security Manager may assign any of the following system rights alone or in combination:
 - Read Only Allows the user to view the data associated with an account. The system will not allow the user to write the data back to the disk. The system will not update the User ID or Last Update Date on the Status Screen running under this option.
 - Update Allows the user to make changes in an already existing account.
 - Add Allows the user to create new accounts.
 - Delete Allows the user to delete accounts.
 - Menu Access Allows the user to access a menu line item.
 - Screen Access Allows the user to access a particular DBM screen.
- Menu Driven Partial System and Full System Backup -- Daily, Weekly, Full File. Also "Save while active" parameter.
- * Ability to table load owners names and addresses by owners code OR type in names and addresses independently without the use of owners codes. eCAM/PP provides for the expeditious entry of multiple property owners, (those who own many properties within the boundaries of the jurisdiction), through Owners Code processing. The Owner ID Code is a 3 character, alpha numeric field, with an active table key. This functionality is very useful in the production of state mandated and high level reports, mass mailing address changes by owner and bundled mailings. This field is tied to an owner's code table which holds codes, names, main and alternate mailing addresses and phone numbers. The input of a valid ownership code "writes" the associated address information to fields 02-07. This aids in the processing of clear, clean, consistent mailing addresses for large property owners.
- eCAM/PP complies with CASS Certified Mailing Address Standards. In March 1993 the Federal Government awarded HE the "Coding Accuracy Support System Quality Certification" Designation. What this means is that

HE is now qualified, through their software, to not only accurately and efficiently maintain records, but automatically enhance the integrity of YOUR property based information as well.

As of March 21, 1993 all bulk mail parcels must include a carrier route ID, as well as spelling and abbreviation standards associated with Street Directions, Street Names and Street Types, in order to qualify for the GREATEST POSTAGE DISCOUNTS with the U.S. Postal Service. This process is called "CASS" certificatio (Coding Accuracy Support Systems), and the mailing addresses in your database must "pass" this certification before every mailing after March 21st in order to obtain the greatest discounts. This will affect ALL mailings from this day forward -- not only for you, but for all of the entities for which you supply "the mailing address". For more information about CASS Certification, please contact the Hamer Enterprises/HE Services Group.

- * A 10 Character Situs Code is provided. This field is tied to a Standardized Situs Code Table. Once Situs Codes are assigned for all or part of the streets in the District, eCAM/PP will load the Street Direction, Street Name, Street Type and Street City in a consistent, standardized manner. Not only does this add to the integrity of the Property Location Address and the Search By Location Function, but increases throughput of data entry when in "create" mode. For example: If Situs Code "101" represents West Mill Creek Road, El Paso -- one can create a situs code table record for "101" with the appropriate Street Direction, Street Name, Street Type and Street City tied to it. When the operator types 101 in the Situs Code, the standardized and approved Street Direction, Street Name, Street Type and Street City (if applicable) are automatically written to the record.
- True Multi-Year Processing Future and Past
- * The following outlines the eCAM/PP Personal Property Account QuickSearch Utility:

When adding new accounts to the database the user need only input a unique account number. The system will then verify the length and uniqueness of the number and then allow the user to add the record. For the purposes of updating and deleting accounts, there are three methods of retrieval:

If the account number is known, the user simply enters the number followed by [Enter]. If the account number is on file, eCAM/PP will pull up all the associated data and place the user in "update" mode. If the account number is not on file, eCAM/PP will place the user in "add" mode for full screen data entry.

If the account number is not known, the user may press the [F16] key once and the cursor will re-locate itself at the Real Estate Reference Account Number Field. If the Real Estate Reference Account Number is known, the user simply enters the number followed by [Enter]. eCAM/PP will then pull up all the associated data pertaining to the personal property located on that real estate record.

If the Real Estate Reference Account Number is not known, the user may press the [F16] key again to invoke the Inquiry Screen for additional search options. Once the Inquiry screen is invoked, a prompt will appear listing the following search options: [A]ccount Number, [R]eal Estate Account Number, Owners [N]ame, [B]usiness Name or [L]ocation. The user then chooses a search option by entering the bracketed letter of the search option followed by [Enter].

Upon selection of either the [A]ccount, [R]eal Estate Reference, [B]usiness Name or [O]wners Name search option, the user enters the search string. This will bring up a listing of all accounts which directly match the search string. If the search option was "[O]wners Name" and the search string was "SMI", the listing would bring up all accounts where the owners name began with "SMI". Likewise if the selected search option was "[A]ccount" and the search string was "B1223", the listing would bring up all accounts where the account number began with "B1223", and so on.

Upon the selection of the [L]ocation search option, the user is prompted for Street Number, then Street Name, and then the Location City. An [Enter] will enact a partial search string and Inquiry will match all Street Numbers, Street Names and/or Location Cities it can and display records matching the string in address order. For instance, if you wish to see 1241 Astoria, you should type "1241" when prompted for Street Number and "Astoria" when prompted for Street Name. If you wish to see the 1200 block of Astoria, you should type "12" when prompted for Street Number and "Astoria" when prompted for Street Name, and so on.

The following information is displayed per account: (Column 1) Selection line #, (Column 2) Account # or Real Estate Reference #, (Column 3) Owner's Name or Business Name and (Column 4) Parsed Location. If there is a large volume of accounts which match the search string, the user may move forward and backward by using the [F13] and [F12] keys. Once the subject account has been located, it may be brought to the Master Screen for verification by entering the applicable line number followed by [Field Exit]. The system then severs the Inquiry tie and the selected account is made available for update.

[NEXT SCREEN] Key ([F13]) and [PREVIOUS SCREEN] Key ([F12]) Note: By selecting an alternate inquiry option, the user "redefines" the [NEXT SCREEN] and [PREVIOUS SCREEN] keys. If the user accesses the account via an account number, the [F13] key accesses the "next" account in account number order. If the user accesses the account via an owner's name, the [F13] key accesses the "next" name in name order, and so on. The same logic applies to the [F12] [PREVIOUS SCREEN] key.

* Hardcopy and On-line System Documentation with key word search and chapter inquiry. The eCAM/PP Hardcopy and On-line CAM System User's Documentation is updated quarterly and distributed throughout our user network in both hardcopy and machine readable form. The machine readable documentation is downloaded into our EZ-DOC[©] utility for immediate user access.

- * Complete On-line "Help" through "point and touch", question and answer and field prompting.
- * Field by Field (opposed to Screen by Screen) data verification. Through our proprietary "FIELD ACCESS" program coding techniques, we have transformed the data entry session into a true interactive session. HE has developed intelligent processes to efficiently interact with the host system's "Native" utilities to provide the user with instant field entry answers -- NOW -- when the tax professional most needs them. Typically, in other data entry scenarios -- on other vendor's systems, the user has to wait until the entire screen is filled out and completed before he knows if the data he inputted ten minutes ago is valid. If the professional's cursor is located in a "coding field" in an EZ-Product which interacts with a table, the user's entry is INSTANTLY validated, adding efficiency, reliability and saving much time and hard cost at the data entry or inquiry session.
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2.3 Quality/Density/Condition Model & Cost Matrix Valuation Approach

- Interfaced to the eCAM/RE System
- The eCAM/PP is a true APPRAISAL system -- it does not simply store personal property values.
- eCAM/PP supports the following Automated Personal Property Appraisal methods:
 - Automated Asset Trending/Depreciation (Global)
 - Automated Asset Trending/Depreciation (Detail)
 - On-Going Asset Depreciation (year by year automatic depreciation)
 - Categorical Base Investment Cost Comparison
 - SIC Quality, Density, Condition Model Valuation
 - Integrated Business Imaging (IBI)
 - Cost Matrices
 - Table Driven Multi-Year Make and Model Valuation Tables for Vehicles, Mobile Homes, any piece of Machinery and Equipment, Computers, etc.
- * Supports IBI model and sub-model valuation through a 5 character Standard Industrial Code, Units of Measure and QDC calls made in the field.
- * Using the Automated Personal Property Appraisal methods above, eCAM/PP provides for the on-line and mass appraisal and tracking of:

- Inventory
- Furniture and Fixtures
- Machinery and Equipment (Long life)
- Machinery and Equipment (Short life)
- Lease Hold Improvements
- Consigned Goods
- Raw Material
- Work In Progress
- Computers
- Vehicles
- Mobile Homes
- Aircraft
- Other
- All eCAM/PP Systems are delivered with a complete set of base models, cost schedules, asset depreciation tables and other Personal Property Coding Tables.
- Personal Property field data collection system methodology incorporates the IBI QDC field calls by business type. If no information is known on the subject except business type and income producing area, the eCAM/PP can mathematically generate several estimates of the Market Value of the subject's personal property using rendition/return and asset listing information from "like" businesses.
- * May make automatic value adjustments per "Level of Trade".
- Provides an "Equality Audit" showing computed total and per unit of measurement values for comparison and benchmarking purposes to insure that each business type is being treated equally (ie. restaurants like restaurants, hotels like hotels, convenience stores like convenience stores, etc...).
- * Provides for parameter controlled value tolerance testing -- providing for the accepting or rejection of renditions/returns by business type, level of trade and/or personal property category.
- Ability to automatically review other business types which are similar to the subject property for comparison of uniformity and accuracy of appraisal.
- * During the tax year, it is very useful for the Appraiser to have the ability to "fine tune" appraisals -- this is especially true during the Hearing process. eCAM/PP includes a "What If" Personal Property Adjustment Screen, which facilitates IMMEDIATE on-line valuation adjustments (without the need for a time consuming "RECALC") based on any one, or a combination of the following user inputted fields:
 - SIC
 - Unit of Measurement

- Level of Trade
- Quality Field Call
- Density Field Call
- Condition Field Call
- Personal Property Category Flat Value
- Line Item Mixture of Flat and System Generated Values
- Percent Good
- Origination Year
- * Allows the user to individually, or automatically by business type or range, correlate personal property values based on weighted values including:
 - Previous Values
 - Owners Rendition
 - Calculated Owners Rendition using on-line District Depreciation Schedules
 - Similar Property Asset Detail Values
 - SIC based IBI Model Driven Values
 - SIC based Cost Matrix Values
- * Ability to test District's appraised values against the Published State Schedules using the State Personal Property Appraisal Methodology.
- On-line access to Current and Previous Year VALUE INFORMATION including Automatic Adjustments and Supplemental Processing PER ENTITY
- * During Adjustment and/or Supplemental Processing, upon the entry of any field number, the cursor will be positioned first in the Adjustment Code Field. The user may place an Adjustment Reason Code in this field before continuing to the targeted field to make the adjustment. eCAM/PP will capture the net affect of the adjustment to the value as well as the tax for the applicable entities and place the adjustments into the Adjustment File for tracking and reporting. eCAM/PP also assigns an Adjustment Type Code and an Adjustment Number to the Adjustment and, along with the Adjustment Reason Code assigned by the user, categorically processes and maintains the supplement or adjustment.
- * Unlimited Area Codes and Tax District Codes and associated Taxing Entity Tables holding Contact Names, Return Addresses, Rates, Exemption Codes and Exemption Worth to the Entity (including local options), Discounts for early payment of taxes, etc.
- * Control File Builder for reporting. This function allows the user to input or scan a file of account numbers. Once the file is built, the user may "submit" the file to multiple report processors.

- * A 999 page free-flow text notes screen is available for each account. Field and office notes may be attached to the appropriate account through this segmenting screen.
- * Special Coding For Owner History
- Ability to flag for including an account for notice processing by reason code
- * Ability to flag for excluding an account from notice processing by reason code
- * Ability to flag for "New" Personal Property. This function is used to code personal property which is considered "new" for reasons such as but not limited to "new business", "annexed", or "omitted"
- * Ability to tie account to an agent, as well as log a "what to receive" code by agent code (Instrument Clearance Code). This code is used to designate the level of authority this agent holds concerning correspondence from the District concerning this property.
- * Ability to flag for Property "Recheck" (Burned, Exemption, Gate was locked, etc...).
- * Ability to code multiple accounts by "Project". This field is used to code personal property on different accounts which is located in the same "project". A project can be a mall, strip center, office complex, etc. Through this code, queries may be run, field work assigned and worksheets printed.
- * Special Coding For Bankruptcies and Bankruptcy number
- * User Defined Reason Codes for special Circumstance
- * Special Coding For Supplements
- * Special Coding Late Exemption Application Filing
- Special Coding For Law Suits and Cause Number
- Special Coding For Returned Mail
- * Special Coding For Mortgage Companies and Loan Number
- Special Coding For ARB/BOE Processing
- * Complete ARB/BOE Scheduling and Processing including automatic Account and Resource Expertise "Matching", Available Resources, Available Time Slots, Available Days
- * Event and Instrument Tracking. ANY event, from phone calls to appeals may be tracked through this module. ANY letter, document, or form created by YOU, may be sent to a tax payer and tracked as well. ANY letter, document, or form which corresponds to an event or action code may automatically be sent to the tax payer and tracked by the system.
- Provides full system integration and data passing to eTAX, the HE Tax Billing, Tax Collection, Tax Entity Distribution and Auditing System. eCAM/PP and eTAX are totally integrated. To understand the term "integration" one must consider the alternative.

Alternate "Combined System" Approach: Most software vendors practice what is many times referred to as an "integrated approach", but is really a "combined approach". For instance, an Appraisal or Assessor's System is developed by one set of programmers in one part of the Country using their adopted standards, terms, logic, screen design, etc. A County Tax Office System is developed by another set of programmers in another part of the nation using their standards, terms, logic, screen design, etc. Some years later, after both systems are complete, they are then patched together to operate as a "whole". Screens do not work the same, to perform one function in one system you use a certain key, to perform the same function in the other system you use another key. Enhancements and legislative changes become cumbersome because the systems were not written from the ground up to be "integrated" -- and there is rarely any uniformity. Each system may perform adequately in its own right independently, but in an integrated environment, a "combined" solution is usually never the best approach.

Integrated Approach: HE adopted an "Integrated Approach" of system design and development early in our business life. This means that our systems were built from the foundation up, following a strict set of technical specifications, to insure <u>total integration</u>.

The same System Design and Programming Team developed eCAM/PP and eTAX using strict coding and logic standards. The screens are exactly the same and operate in the same manner, the report prompting logic is the same, the record add/update/delete functions are the same, the purpose of particular function keys in eCAM/PP are the same as in eTAX, the positive/negative logic is the same, the passing of supplemental and correction data is very smooth and efficient. Future enhancements and legislative changes may be performed very efficiently and timely, because there is TOTAL consistency between the homogeneous systems. This increases productivity tremendously. If one knows how to get around the eCAM/PP system, one can get around the eTAX system. If one knows what a function key does in one system, one knows for the other. It also places first time users and new employees in production much quicker.

Abatement processing including abatement profiles.

Like most modules in eCAM, abatement processing is a table driven process. Through the use of a unique Exemption Code on the Master Screen, an Abatement Exemption Class in the Exemption Tables and the Abatement record in the Abatement Profile, abatement processing and tracking is accomplished in a very thorough and efficient manner.

The Abatement Profile Table is used to list general administrative information and unique abatement information by entity for each record in the Jurisdiction which is involved in Abatement Processing. If an account holds an exemption code which has an exemption class of "A" in the exemption tables, eCAM/PP traverses the Abatement Profile for the account number and based on the data in the Abatement Profile, an alternate Net Taxable Value and/or levy is calculated.

2.4 Reporting

eCAM/PP Reporting Note: ALL eCAM/RE reports may be viewed on the terminal or sent to a user defined printer.

- * Appraisal and Assessment Reports Include:
 - Field Worksheets
 - Property Record Card (PRC)
 - Multi-Year Master and Entity Appraisal Rolls
 - Multi-Year Master and Entity Appraisal Roll Summary Totals. Aggregate Appraised, Partial Exemptions, Full Exemptions, Abatements, Ag and Timber Deferrals, Net Taxable Values, etc.
 - Notices of Appraised Value In-house demand
 - Notices of Appraised Value Xerox Laser Format Long Form
 - Notices of Appraised Value Xerox[®] Laser Format Postcards
 - Exemption Listings
 - User Code Reports
 - Returned Mail Report
 - User Defined Line Listings based on multiple field contents
- * Database Reports Including:
 - Value Tolerance Report by Business Type
 - Equality Audit by Business Type
 - Account Detail and Summary Report
 - Asset Listing Audit Reports
 - Lessee Reference Report
 - Total Property in County Leased by Lessee Report
 - Recheck Code Report
 - Notice Status Flag Report
 - Hearing Status Code Report
 - Exempt Code Report
 - Undivided Interest Report
 - New Personal Property Report
 - Project Code Report
- * High Level Reports Include:
 - Master and Entity Totals incorporating:
 - ⇒ Gross Values
 - ⇒ Partial Exemption Loss
 - ⇒ Deferred Values
 - ⇒ Full Exemption Loss
 - ⇒ Freeze Totals and Loss for ISDs

- ⇒ New Construction
- Top Taxpayers Reports (By User inputted single or multiple State Codes)
- State Code and/or Land Use Totals Reports
- Continuous Form Report (199x Format)
- Value Stratification Report
- SIC Totals Report
- * Exception Reports Include:
 - Maximum Value and/or Percent Increase/Decrease Reports
 - Value Tolerance Comparison Reports
 - Value Comparison Ratio Reports
 - Data Field Contents Validation Reports
 - Code/Table Audit Reports
- Site Specific Query Reports:
 - Very Easy-To-Learn-And-Use Report Writing, Tape File and Database Building Utilities which efficiently step the novice user through single and multiple file database reports, available field selection, creating fields and testing against them, included record selection criteria, sorts and subsorts, subtotals and grand totals, multiple line listings, customizing report headers and cover pages, adding a database or report utility to YOUR menu and much more.
 - Very Easy-To-Learn-And-Use Form Letter and Document Design Utilities which efficiently step the novice user through full word processing capabilities - dictionary, thesaurus, grade level checker. Automatically merging the data in your real estate and personal property tax files with the form letters you wrote, or documents you designed. Available field selection, creating fields and testing against them, included record selection criteria, sorts and subsorts and much more. Once you have a form letter boiler plate as you like it, you may add it to YOUR menu.
 - The user has the ability to tailor their own Site Specific Query Reports in the Report Menu Tree and their own Site Specific Query Utilities in the Utility Menu Tree through the EZ-MENU Utility.
 - Calendaring is another menu driven function available in the eCAM/PP solution. Reports, utilities and other programs may be scheduled with time and date start/stop options for running in convenient, non-peak periods of computer use. For example, assume you have written a report, which you would like to review every Wednesday morning, you have the ability to enter that report into a Calendar and have it waiting for you at your arrival to the office.

3. ECAM/MI (Mineral & Industrial System)

3.1 Administrative Features

- Easy to use on-line menu builder.
- * Completely menu driven (Database Management, Tables Maintenance, Reports and Utilities)
- * HotKey and Acronym FastPath capabilities for immediate access to often used documents, screens and menu line items.
- * Security file maintenance and incremented "user rights" levels at the Main Menu, SubMenus, Menu Line Item and Screen level. Through the use of a "Sentry File" the designated Security Manager has the ability to assign a unique set of rights to each user which will enable them to perform their assigned tasks within the system. The security file contains the user's name and unique ID, along with the following multiple entry fields (1) menu names, (2) menu line item options, (3) DBM screen names, (4) passwords and (5) access rights, as defined by the Security Manager. For example, a given user may be assigned a read only login. Such a login would allow this user to view the data associated with a subject account, but not allow any updates, etc. The Security Manager may assign any of the following system rights alone or in combination:
 - Read Only Allows the user to view the data associated with an account. The system will not allow the user to write the data back to the disk. The system will not update the User ID or Last Update Date on the Status Screen running under this option.
 - Update Allows the user to make changes in an already existing account.
 - Add Allows the user to create new accounts.
 - Delete Allows the user to delete accounts.
 - Menu Access Allows the user to access a menu line item.
 - Screen Access Allows the user to access a particular DBM screen.
- Menu Driven Partial System and Full System Backup -- Daily, Weekly, Full File. Also "Save while active" parameter.
- * Ability to table load owners names and addresses by owners code OR type in names and addresses independently without the use of owners codes. eCAM/MI provides for the expeditious entry of multiple property owners, (those who own many properties within the boundaries of the jurisdiction), through Owners Code processing. The Owner ID Code is a 3 character, alpha numeric field, with an active table key. This functionality is very useful in the production of high level or state mandated reports, mass mailing address changes by owner and bundled mailings. This field is tied to an owner's code table which holds codes, names, main and alternate mailing addresses and phone numbers. The input of a valid ownership code "writes" the associated address information to fields 02-07. This aids in the

processing of clear, clean, consistent mailing addresses for large property owners.

* eCAM/MI complies with CASS Certified Mailing Address Standards. In March 1993 the Federal Government awarded HE the "Coding Accuracy Support System Quality Certification" Designation. What this means is that HE is now qualified, through their software, to not only accurately and efficiently maintain records, but automatically enhance the integrity of YOUR property based information as well.

As of March 21, 1993 all bulk mail parcels must include a carrier route ID, as well as spelling and abbreviation standards associated with Street Directions, Street Names and Street Types, in order to qualify for the GREATEST POSTAGE DISCOUNTS with the U.S. Postal Service. This process is called "CASS" certification, (Coding Accuracy Support Systems) and the mailing addresses in your database must "pass" this certification before every mailing after March 21st in order to obtain the greatest discounts. This will affect ALL mailings from this day forward -- not only for you, but for all of the entities for which you supply "the mailing address". For more information about CASS Certification, please contact the Hamer Enterprises/HE Services Group.

- * A 10 Character Situs Code is provided. This field is tied to a Standardized Situs Code Table. Once Situs Codes are assigned for all or part of the streets in the District, eCAM/MI will load the Street Direction, Street Name, Street Type and Street City in a consistent, standardized manner. Not only does this add to the integrity of the Property Location Address and the Search By Location Function, but increases throughput of data entry when in "create" mode. For example: If Situs Code "101" represents West Mill Creek Road, El Paso -- one can create a situs code table record for "101" with the appropriate Street Direction, Street Name, Street Type and Street City tied to it. When the operator types 101 in the Situs Code, the standardized and approved Street Direction, Street Name, Street Type and Street City (if applicable) are automatically written to the record.
- * True Multi-Year Processing Future and Past
- The following outlines the eCAM/MI Mineral Account QuickSearch Utility:

When adding new accounts to the database the user need only input a unique account number. The system will verify the length and uniqueness of the number and then allow the user to add the record. For the purposes of updating and deleting accounts, there are three methods of retrieval:

If the account number is known, the user simply enters the number followed by [Enter]. If the account number is on file, eCAM/MI will pull up all the associated data and place the user in "update" mode. If the account number is not on file, eCAM/MI will place the user in "add" mode for full screen data entry.

If the account number is not known, the user may press the [F16] key once and the cursor will re-locate itself at the Real Estate Reference Account Number Field. If the Real Estate Reference Account Number is known, the user simply enters the number followed by [Enter]. eCAM/MI will then pull up all the associated data pertaining to the personal property located on that real estate record.

If the Real Estate Reference Account Number is not known, the user may press the [F16] key again to invoke the Inquiry Screen for additional search options. Once the Inquiry screen is invoked, a prompt will appear listing the following search options: [A]ccount Number, [R]eal Estate Account Number, Owners [N]ame, Owner [I]D, Lease [N]umber, or [L]ocation. The user then chooses a search option by entering the bracketed letter of the search option followed by [Enter].

Upon selection of either the [A]ccount, [R]eal Estate Reference, [B]usiness Name or [O]wners Name search option, the user enters the search string. This will bring up a listing of all accounts which directly match the search string. If the search option was "[O]wners Name" and the search string was "SMI", the listing would bring up all accounts where the owners name began with "SMI". Likewise, if the selected search option was "[A]ccount" and the search string was "B1223", the listing would bring up all accounts where the account number began with "B1223", and so on.

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3.2 Appraisal Management Features

- * Contains standard account identification fields, as well as pertinent information which outlines the valuation of a given mineral or industrial account.
- eCAM/MI includes the following Administrative Data fields:
 - Account Number
 - Tax District Code
 - Name
 - Address
 - City, State
 - Zip Code
 - Legal Description
 - State Code
 - Property Type
 - Remarks
- eCAM/MI includes the following data fields and calculation variables:

- Property Type
- Railroad Commission District
- Railroad District Lease Number
- Division Order Tract Number
- Mineral Interest
- Mineral Interest Type
- Owner Number
- Acres
- Origination Year
- 100% Mineral Parcel Value
- Appraisal District Percentage
- Appraisal District Amount
- Status Flag
- Other Lease Number
- eCAM/MI includes the following data fields and calculation variables by Entity:
 - Boundary Percentage
 - Production Floor
 - Jurisdiction Amounts

3.3 Reporting

- * Appraisal and Assessment Reports Include:
 - Field Worksheets
 - Property Record Card (PRC)
 - Multi-Year Master and Entity Appraisal Rolls
 - Multi-Year Master and Entity Appraisal Roll Summary Totals. Aggregate Appraised, Partial Exemptions, Full Exemptions, Abatements, Ag and Timber Deferrals, Net Taxable Values, etc.
 - Notices of Appraised Value In-house demand
 - Notices of Appraised Value Xerox® Laser Format Long Form
 - Notices of Appraised Value Xerox[®] Laser Format Postcards
 - Exemption Listings
 - User Code Reports
 - Returned Mail Report
 - User Defined Line Listings based on multiple field contents
- Database Reports Including:
 - Lesser/Lessee Reference Report
 - Total Property in County Leased by Lessee Report
 - Recheck Code Report

- Notice Status Flag Report
- Hearing Status Code Report
- Exempt Code Report
- Undivided Interest Report
- New Personal Property Report
- Project Code Report
- * High Level Reports Include:
 - Master and Entity Totals incorporating:
 - ⇒ Gross Values
 - ⇒ Partial Exemption Loss
 - ⇒ Deferred Values
 - ⇒ Full Exemption Loss
 - ⇒ Freeze Totals and Loss for ISDs
 - ⇒ New Construction
 - Top Taxpayers Reports (by user inputted single or multiple State Codes)
 - State Code and/or Land Use Totals Reports
 - Continuous Form Report (199x Format)
 - Value Stratification Report
 - SIC Totals Report
- * Exception Reports Include:
 - Maximum Value and/or Percent Increase/Decrease Reports
 - Value Tolerance Comparison Reports
 - Value Comparison Ratio Reports
 - Data Field Contents Validation Reports
 - Code/Table Audit Reports
- * Site Specific Query Reports:
 - Very Easy-To-Learn-And-Use Report Writing, Tape File and Database Building Utilities which efficiently step the novice user through single and multiple file database reports, available field selection, creating fields and testing against them, included record selection criteria, sorts and subsorts, subtotals and grand totals, multiple line listings, customizing report headers and cover pages, adding a database or report utility to YOUR menu and much more.
 - Very Easy-To-Learn-And-Use Form Letter and Document Design Utilities which efficiently step the novice user through full word processing capabilities - - dictionary, thesaurus, grade level checker. Automatically merging the data in your real estate and personal property tax files with the form letters you wrote, or documents you designed. Available field selection, creating fields and testing against them, included record selection criteria, sorts and subsorts and much more.

- Once you have a form letter boiler plate as you like it, you may add it to YOUR menu.
- The user has the ability to tailor their own Site Specific Query Reports in the Report Menu Tree and their own Site Specific Query Utilities in the Utility Menu Tree through the EZ-MENU Utility.
- Calendaring is another menu driven function available in the eCAM/MI solution. Reports, utilities and other programs may be scheduled with time and date start/stop options for running in convenient, non-peak periods of computer use. For example, assume you have written a report, which you would like to review every Wednesday morning, you have the ability to enter that report into a Calendar and have it waiting for you at your arrival to the office.
- * The Application Software Product Description shall conform and comply with the Indiana State certification requirements.

EXHIBIT D: PROJECT SCHEDULE MILESTONE ESTIMATED DELIVERY TIME FRAMES

PROJECT MILESTONE	TIME FRAME*
Delivery and Execution of Purchase and Implementation Agreement	00 – 01 Days
Delivery of SYSTEM Preparation Software and Base Application Programs	60 – 150 Days
Delivery of Converted, Balanced Entity Total	150 – 210 Days
Completion of Final Acceptance Testing	210 – 300 Days
	*Business Days

APPENDIX A.

The following letter contains information from other companies, organizations and government entities and their associated products and information including but not limited to, IBM, Microsoft, Apex, Visa, MasterCard, Discover, American Express, U. S. Department of Defense, ESRI, State of Indiana DLGF, Pictometry, Marshall and Swift and Hamer Enterprises Clients. Hamer Enterprises makes no warranties or representation whether implied or stated as to these companies, organizations and government entities or their products and information in regards to the following letter written on June 12, 2007.

1. Platform: Leverages modern technology to create efficiencies within the office.

HE: Hamer Enterprises utilizes client server technology in conjunction with IBM's DB2 database running on the IBM i5 Server. This provides the highest degree of security and reliability known in the industry today. All third party software such as Microsoft ®, Excel®, Word®, ESRI, ArcGIS® Systems that use standard ODBC and JDBC drivers are or can be integrated into the iSeries DB2 Database and therefore can be integrated into the HE eTAX and HE eCAM Solution.

The Cost of Ownership based on the iSeries over a 5-year period is significantly less than all other platforms utilized today. The iSeries is a single server with a highly integrated operating system and database. Thus making it one of the most easy to manage and self sufficient systems on the market today.

At the founding of Hamer Enterprises in 1975, HE solutions began to implement the very technologies utilized throughout the world. It is the modern technologies as well as future technology utilized in todays integrations that continue to be the focal point of HE. This focus has leveraged Hamer Enterprises in the industry enabling implementations of cutting edge solutions with the highest level of security, service and innovative design. As part of the innovative design, today HE development teams are rolling out new products which use n-Tier and SOA technologies.

For example HE's payment gateway used by 10s of thousands of taxpayers throughout the world. i.e.. North America, South America, Europe, Africa and the Middle East to name a few; used by citizens and soldiers to pay online property tax payments. This automated process directly impacts revenue streams for the county and the cost savings is instantly measured as the collections continue 24 hours a day, 7 days a week, 365 days a year.

Furthermore the eTAX System allows citizen interaction for online Internet web search by citizen, secure online payment by electronic check, Visa®, MasterCard®, Discover® or American Express®. Instant receipting, real-time payment posting to the HE backend solution in a real-time environment.

It also might be noted that the integrated eTAX and eCAM System running on the IBM AS/400 or IBM i5 SERIES is predicated on a level of security that has been recognized by the Department of Defense as one of the most secure platforms in the world with an impressive DOD C-2 level of trust. This is imperative to state, local and county government due additional demands being placed upon various agencies of government to provide secure access for taxpayers needs and data without the potential for data corruption and unlawful access.

2. Client services: Is their support procedures and structure adequate for an enterprise-wide application as demanding as an Assessment, Tax and Billing system can be.

HE: HE developed an in-house system know as the "Software Action Request System (SAR)." This System is multifaceted to include I-800 calls into the support center, emails into the support center, faxes into the support center or any other convenient method chosen by the client. As part of the SAR System, all calls are routed to specific Software Support Specialists who have industry and programming knowledge of the particular support call that's been related. This process is accomplished through an online notification system. Once a determination is made by the Support Specialist the SAR can be then routed to a Senior Engineer if necessary. The SAR System provides automated reports to management providing up to the minute status of each SAR. Additionally, the SAR's are tracked for each client and a support manager will follow-up on any outstanding SAR issue. Various reports are available to the client as to the status, individual assigned and other collateral type information that may be necessary for the client. This proven SAR System has been utilized by Hamer Enterprises for over 10 years.

3. Multi-Year Database: Does the application provide comprehensive multi-year support for assessment data including historical ownership, historical address changes, online value modifications, access to prior modifications, "as of date" or point-in-time summary totals, automated balancing of summary totals, property data sheets for prior years, multi- year valuation pricing schedules, an multi-year valuation factors including neighborhood adjustments, regions adjustments, subdivision adjustments, Marshall and Swift local area modifiers, cost calibration modifiers, historical neighborhood profiling to support and defend prior year valuation-to name a few requirements.

HE: YES, See below HE Response #4 - Future Year Changes

4. **Future Year Changes:** Ability to apply data changes for future year and create subdivisions, process splits and merges.

HE: YES

- ARB Processing
- Special Coding For ARB/BOE Processing
- Complete ARB/BOE Automatic Scheduling and Processing including automatic Account and Resource Expertise "Matching", Available Resources, Available Time Slots, Available Days and overbooking capabilities.
- Formal and Informal (stipulated) Appeals processing.
- eCAM/RE holds Pre-hearing and Post-hearing values in order to statistically analyze strengths and weaknesses during the hearing process.
- * During the tax year, it is very useful for the Appraiser to have the ability to "fine tune" appraisals -- this is especially true during the Hearing process. eCAM/RE includes a "What If" Improvement Adjustment Screen, which facilitates IMMEDIATE on-line improvement valuation adjustments (without

the need for a time consuming "RECALC") -- based on any one, or a combination of the following user inputted fields:

- Improvement Class
- Rate
- Rate %
- Improvement Type (A, B, C, D, S, F, M)
- Effective Age
- Typical Life
- Physical Condition Percent Good
- Economic Obsolescence
- Functional Obsolescence
- Percent Complete
- Sketched Area or User Inputted Area
- * During the tax year, it is very useful for the Appraiser to have the ability to "fine tune" appraisals -- this is especially true during the Hearing process. eCAM/RE includes a "What If" Land Adjustment Screen, which facilitates IMMEDIATE on-line land valuation adjustments (without the need for a time consuming "RECALC") based on any one, or a combination of the following user inputted fields:
 - Valuation and Unit Type (Acreage, Square Foot, Front Foot, Per Lot, Flat Price)
 - Market Code (Quality/Geo Code bridged to size/rate models)
 - Ag Code (Ag and/or Timber Type/Quality/Geo Code bridged to size/rate models)
 - Frontage or Depth
 - Number of Units (Acres, Square Feet)
 - Table Driven Market Rate or User Override
 - Table Driven Segment and Overall Adjustment Codes/Reason Descriptions and Percentages, or User Override.
 - Event and Instrument Tracking. ANY event, from phone calls to appeals may be tracked through this module. ANY letter, document, or form created by YOU, may be sent to a tax payer and tracked as well. ANY letter, document, or form which corresponds to an event or action code may <u>automatically</u> be sent to the tax payer and tracked by the system.
 - On-line access to Current and Previous Year VALUE INFORMATION including Automatic Adjustments and Supplemental Processing PER ENTITY.
 - During Adjustment and/or Supplemental Processing, upon the entry of any field number, the cursor will be positioned first in the Adjustment Code Field. The user may place an Adjustment Reason Code in this field before continuing to the targeted field to make the adjustment. eCAM/RE will capture the net affect of the adjustment to the value as

well as the tax for the applicable entities and place the adjustments into the Adjustment File for tracking and reporting. eCAM/RE also assigns an Adjustment Type Code and an Adjustment Number to the Adjustment and, along with the Adjustment Reason Code assigned by the user, categorically processes and maintains the supplement or adjustment.

- Multi-Year processing
- * The HE Appraisal Management System, eCAM is a very efficient, user friendly, circumstance/category table/code driven system -- utilizing the cost, market and income approaches to value.
- * On-line History and Multi-year processing. Allowing the CAD to work on a reappraisal WITHOUT being locked out of their files for months.
- True Multi-Year Processing Future and Past
 - MANY utilities and best business practices integrated into eCAM/RE take the "remembering" and the "guess work" out of high level or state mandated activities. Based on conditions in the file, high level or state mandated functions are automatically performed.
 - Automatic retrieval and correlation of Values determined by the Cost Approach, Market Approach and Income Approach, in order for individual or mass loading of "Correlated" Appraisal Estimates.
 - On-line access to Current and Previous Year's TAX INFORMATION including Automatic Calculation PER ENTITY of Appraisal Estimate impact on Net Taxable Values and Tax Levy.
 - Complete Multi-Year Supplemental Processing and Impact Reporting
 - On-line access to Current and Previous Year VALUE INFORMATION including Automatic Adjustments and Supplemental Processing PER ENTITY.

During Adjustment and/or Supplemental Processing, upon the entry of any field number, the cursor will be positioned first in the Adjustment Code Field. The user may place an Adjustment Reason Code in this field before continuing to the targeted field to make the adjustment. eCAM/RE will capture the net affect of the adjustment to the value as well as the tax for the applicable entities and place the adjustments into the Adjustment File for tracking and reporting. eCAM/RE also assigns an Adjustment Type Code and an Adjustment Number to the Adjustment and, along with the Adjustment Reason Code assigned by the user, categorically processes and maintains the supplement or adjustment.

5. **Sketching:** Industry standard sketching program. Third-party sketching software vendors insist on storing our sketching vector data in their own proprietary format. This would not be a good idea for Porter County as it will always be dependent on any third-party application that stores data in a proprietary format.

HE: Not only are we using APEX and recommending APEX, APEX is the "Industry Standard." APEX is the "Best of Breed". APEX has proven their ability with thousands of installations worldwide. Enhancements have been implemented to make the programs and products available, accessible, useable and continue to do so; therefore by using APEX software you will get the best not only today, but tomorrow and well into the future.

APEX: Apex Software has become the "industry standard" because of the ease of drawing methods, wide range of features and innovative mobile software research and engineering.

Our single largest client base is approximately 85% to 90% of the fee appraisers for real estate mortgage needs. Apex currently is the sketching software of choice in over 1500 jurisdictions ranging from single person township assessors, small to medium municipal assessment offices, county wide mass appraisal districts and offices as well as statewide contracts in Tennessee, Maryland and Wyoming.

Over 60% of our mass appraisal clients use Apex as an integrated sketch tool with their CAMA system of choice and Apex is now working with about 25 - 30 of these CAMA development companies. Over the past few years, Apex sketching software has become one of the primary area calculation tools used in the property insurance industry for inspection and underwriting needs (insure to value & and loss control).

Apex Software does utilize an internal file format that has evolved over the years when no other suitable format could handle the growing number of drawing features industry clients were asking for.

Also, the area calculation methods employed by Apex are guaranteed accurate and backed by a \$1 Million + E&O Insurance policy. No other sketching tool provides this assurance.

In response to: "Vendor: Utilizes a closed third-party application from APEX. All sketching data will be stored in APEX's proprietary format and the County will ALWAYS be reliant on APEX to render sketches."

APEX: HE, like most of the other major CAMA developers have chosen to integrate highly focused, specialized tools like Apex Software for certain aspects of their CAMA system. This allows them to concentrate their development resources on what they do best. Apex Software was selected because it does represent the industry standard for meeting the drawing and area calculation needs of the mass appraisal industry.

Apex has also been on the leading edge of providing automatic file duplication to standard image formats for viewing and printing needs without requiring a sketch engine to reinterpret the sketch vector data. The files can also be automatically saved to another industry standard format - .SHP files which negates most "proprietary file format" issues that are brought up as diversions. The .SHP file development is relatively innovative and additional discussions continue to determine what types of additional data should be included in these files. Initially, they were provided to allow the mapping and GIS departments to gain addition use of the accurate drawings created by the appraiser's office from on-site property inspections. They were combined using ESRI or other GIS software applications to create a building foot print layer within the GIS map. The layer can be compared with Ortho photography for low cost change detection review. These additional file format duplication capabilities are designed to make the Apex data a better value for the entire local government entity.

Apex Software is actively working with the IAAO standards committee to determine if there should be a common or industry standard file format for sketch vector data. If a common denominator is developed, Apex will add that to the existing additional file formats that are already included in existing products. Apex is also open to any contractual agreements designed to insure our clients

legitimate information needs although the additional costs would be born by the individual jurisdiction. To date, it has not been a significant enough issue to pursue beyond the safeguards already in place as mentioned above.

6. **Field Devices:** Does the vendor provide support for field devices with user-configurable workflow screens?

HE: HE will configure field devices to meet the County's specific needs. Further, HE has included Field Device configuration as part of our proposal.

7. **GIS Integration:** Does the vendor provide integrates the latest in GIS technology into their application including direct access to shapefiles, ArcSDE databases, Images and coverages?

And then use the integration to allow for mass appraisal of property using a GIS interface as a front-end?

HE: YES

These are more of usage questions for how the CAMA system will interface with GIS applications. Apex supports the use of existing industry file formats for efficient use by these systems.

8. **Appeals Tracking & Scheduling:** Does the vendor provide a comprehensive appeals tracking and scheduling system needed for a growing county such as Porter County and be efficient so as to provide good service to the taxpayers.

HE: YES

9. **Commitment:** Commitment to do business in Indiana by investing resources in performing a high-level gap analysis of our operation, performing multiple demonstrations, converting our sample data and demonstrating it back to us.

HE: Absolutely YES!

On February 6th, 7th and 8th 2007, HE demonstrated HE's eTAX/eCAM, EZ-NETPAY, APEX Sketching and various modules associated to the solution to Porter County Representatives. During the visitation in Texas the representatives were introduced to 3 clients utilizing HE solutions.

On February 20th and 21st 2007, HE CEO and HE Representative demonstrated the functionality of the eTAX/eCAM and Apex Solution System in Porter County. Upon the close of the Assessors demonstration a very appreciated applause was led by the Porter County Assessor, Mr. John Scott followed by several attending the demonstration.

On March 14th 2007, HE demonstrated ability to provide Porter County with a customized view of a Property Record Card, on-demand, literally over-night delivering the first Indiana PRC designed with DLGF standards.

In April 2007, HE successfully loaded full copy of records for conversion analysis. HE evaluated the structure and integrity of the data. HE estimated the number of hours to convert the data.

On May 17th, 2007 HE Representatives demonstrated several unique features of the eCAM and eTAX System.

On May 22nd and 23rd, HE Representative appeared before the Porter County Council and met with various Porter County departments. HE Representative also attended the DLGF Auditors meeting regarding TIF.

It is clear the State of Indiana and its Counties have a desire to improve current processes. It is this very reason that HE has committed in contractual writing to provide Indiana Counties the Property Tax Management System (eTAX) and Integrated Mass Appraisal System (eCAM) to Porter County. From year 2004 to today the State of Indiana has provided the best all level analysis for integration. HE has committed resources to this project and has been constantly in contact with the DLGF. HE has already begun testing process for certification. Furthermore, HE has several new modifications received by Mr. Barry Wood, Director of Assessment Division, DLGF regarding assessment and refund related updates. HE is already underway regarding "Hot Topics" like "Circuit Breaker: School construction guidance, Withholding of State Property Tax Replacement Credit".

Countless hours from mid 2006 to today have been invested understanding Indiana business rules and analysis of all levels, administrative and user process have been studied to determine that HE's solutions can be synchronized for an Indiana County's greatest success.

10. Ability to generate checks to tax entities & refund checks to taxpayers when necessary.

HE: YES, As recently as June 5th, 2007 the DLGF notified HE as to the latest information regarding HEA 1001-2007 and its impact on the HE Solution. This ability to change as well as any future legislative or State mandated change is inclusive under the support agreement with Porter County or any customer of HE.

11. **Source Code:** Is the source code available to Porter County in the event the software vendor is no longer in business or decides to stop supporting the product in Indiana?

HE: HE agreed to make our source code available to Porter County regardless if it is no longer in business or decides to stop supporting the product in Indiana. In fact if Porter County desires to make modifications or add on to the software, Porter County has been given the authority to do so thru special contract language.

12. Years in Business:

HE: During the 32 years in business HE began writing systems unique to the local and county Government in TAX and CAM. HE understands workflows and processes to get the job done. As workflow specialists, HE's autonomous process committed to alleviate manual input along with customized solutions. HE's 32 years in business has proven resilience through changes in technology while understanding existing current county infrastructures and budget constraints throughout the United States.

It is HE's goal to improve customer's expectations while minimizing the taxpayer burden. Furthermore, it is HE's commitment to empower the County Assessor, Township Assessors, Treasurer, Auditor and IT with the necessary tools to greatly improve the perception and level of trust in Porter County.

13. **Document, Digital Imaging and Pictometry Imaging:** Does the system offer integrated imaging and digital functionality? Does the system offer integration to Pictometry Imaging?

HE: HE's solutions allow integrated imaging and digital functionality at authorized user level with history and event tracking. Any electronic document, digital image, video, mp3, audio file, or attachment that can be saved to a file by electronic means on to PC or Server can accomplished with user friendly Windows Explorer to a specified server for access, saving or retrieval using "drag and drop" or "save as" functions. The HE Solution will display the image(s) or documents, which exist, associated to the parcel by respective parcel number. Many of the views and screens display images such as multiple photos of the property(s), sketch(s), scanned building permit, mortgage note, NSF check, scanned refund checks, letters. Etc. All of which can be accessed updated or printed on demand.

What is Pictometry?

Pictometry is a photography company. The company develops systems that allow users to have images of properties from multiple views at the click of a mouse.

HE: HE's solutions allow integrated imaging through HE integrated APEX solution. http://www.apexwin.com/v5/home.php

14. Approach to Value:

HE:

15. Overall Costs:

It is important to note that initial acquisition cost is by no means the overall project costs. You have to consider factors such as:

1. Will the vendor assign a dedicated project manager for the project or will the County have to appoint an in-house PM.

HE: YES, HE will assign a project manager.

2. Will the vendor conduct all training onsite?

HE: YES

3. Will the vendor perform the majority of their research on their own when implementing changes to their application to conform to State rules.

HE: YES

4. Will the vendor create all necessary Software Requirements Documents (SRD) that documents the changes needed in the application.

HE: YES although this may be called something other than SRD. See Number 2. Client Services.

5. Will the vendor provide a cap on all professional services costs including travel and lodging expenses?

HE: YES, HE will invoice as occurs from an estimated "will not exceed" Travel and Expenses line item. HE has capped costs on professional services as agreed upon in contractual agreement.

6. Will the vendor monitor state legislation to insure product stays in compliance?

<u>HE</u>: YES! The DLGF has already sent legislative updates to HE and we are incorporating these into the system. HE is extremely proactive and proficient regarding local and state legislation.

7. Will the vendor fund all changes required for 50 IAC 23 certification AND <u>recertification in future years?</u>

HE:

<u>Application Software User-based Support Services Agreement Section 4 Subsection (i) pg.44</u>

"HE shall provide CLIENT with all government mandates free of charge with an executed support agreement in place prior to mandate."

8. What is the cost for use of an inefficient system that requires many manual steps to complete your work?

HE: Fortunately an efficient system can be installed. ETAX and eCAM addresses manual steps and processes so that work can be automated to increase staff productivity.

Alternate "Combined System" Approach: Most software vendors practice what is many times referred to as an "integrated approach", but is really a "combined approach". For instance, an Appraisal or Assessor's System is developed by one set of programmers in one part of the Country using their adopted standards, terms, logic, screen design, etc. A County Tax Office System is developed by another set of programmers in another part of the nation using their standards, terms, logic, screen design, etc. Some years later, after both systems are complete, they are then patched together to operate as a "whole". Screens do not work the same, to perform one function in one system you use a certain key, to perform the same function in the other system you use another key. Enhancements and legislative changes become cumbersome because the systems were not written from the ground up to be "integrated" and there is rarely any uniformity. Each system may perform adequately in its own right independently, but in an integrated environment, a "combined" solution is usually never the best approach.

Integrated Approach: HE adopted an "Integrated Approach" of system design and development early in our business life. This means that our systems were built from the foundation up, following a strict set of technical specifications, to insure <u>total integration</u>.

The same System Design and Programming Team developed eCAM and eTAX using strict coding and logic standards. The screens are exactly the same and operate in the same manner, the report prompting logic is the same, the record add/update/delete functions are the same, the purpose of particular function keys in eCAM are the same as in eTAX, the positive/negative logic is the same, the passing of supplemental and correction data is very smooth and efficient, etc. Future enhancements and legislative changes may be performed very efficiently and timely because there is TOTAL consistency between the homogeneous systems.

This increases productivity tremendously. If one knows how to navigate throughout the eCAM system, one can get around in the eTAX system. If one knows what a function key does in one system, one knows for the other, etc. It also places first time users and new employees in production much quicker.

9. By contrast, what is the savings in cost for the use of a highly functional software system that eliminates many manual steps and creates efficiencies throughout the office?

HE: HE customers have measured cost savings by office automation. The very task of the Assessor is for valuation and costs associated to property. HE's table driven solutions assists the Assessor with the tools in plain view to reduce steps. Countless workflows are streamlined and assigned through County governed business rules to view where every department is ensuring greater accountability. Another labor efficiency regarding the Property Record Cards, during Appraisal Recalculation and other commonly processed tasks are now available at the touch of a button.

The eTAX and eCAM Event and Instrument Tracking process monitors ANY event, from phone calls to appeals can also be tracked through this module. ANY letter, document, or form created by the Treasurer, Auditor or Assessor may be sent to a taxpayer and tracked as well. ANY letter, document, or form which corresponds to an event or action code may <u>automatically</u> be sent to the tax payer and tracked by the system.

HE's eTAX and eCAM solution is a fully integrated system which, monitors all changes as they occur by existing County staff. The safety of citizen's information is protected by one of the most secure servers in the world and fortunately Porter County already owns it. As many of the manual processes are eliminated through the implementation of this solution, savings in not only cost, but time. The time savings can be converted into productivity and moral can actually be positively affected, as now all staff will have the tools to do a great job at Porter County.

Porter County citizens will have the ability to view property related information on line. This in turn will relieve phone calls during peak hours eliminating wait time improving the experience for all. The citizen will have this option globally 24/7/365. Self-serve citizens so empowered create cost savings to the county. The elimination of handling, eliminating errors, processing and posting, endorsing etc. The automated posting of a payment online completely eliminates manual posting of transactions. Mass posting and mass routines incorporated in the eTAX and eCAM system further reduce costs.

HE has in its software conversion library, a comprehensive set of conversion programs—which are proven and tested. Thousands of man hours have gone into these established programs which provide for a quick and secure data conversion from your present data storage and automation system(s), into the QUICK and THOROUGH Distributive Database Architecture of the new solution. This is a MAJOR cost and time benefit and should be heavily considered—as well as the five-year cost of ownership. Not only for cost efficiency—but system and data integrity.

Clearly the eTAX and eCAM Solution is an end-to-end integrated automated solution that achieves both efficiency, compliance, automation, value, a measurable return on investment, a best rated Cost of Ownership, utilizing existing infrastructure with current skill sets.

In closing the eTAX and eCAM System is aligned with the goals of design for an integrated tax and cam system for Auditor, Treasurer and Assessor providing uniform data entry through integrated single database in a uniform and common tax management system. The eTAX and eCAM Solution directly addresses a responsive government regarding citizens 24/7 access informing taxpayers and improving customer service. The DLGF wins for the State of Indiana, an achievable goal through efficient management of a statewide process and interactivity of better accounting and capturing of costs through Porter County's eTAX and eCAM System.